WebEOC

Administrator Manual

Version 7.5

intermedix™

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Welcome

WebEOC® Professional is Crisis Information Management Software (CIMS) that was developed over a decade ago to meet the needs of emergency management agencies (EMAs) at the federal, state, and local levels.

Today, WebEOC is not only used by government agencies such as the U.S. Departments of Agriculture, Defense, Energy, Homeland Security (CDP, FEMA, ICE, TSA, and USCG), Health and Human Services, EPA, and NASA, but also by corporations, public utilities, universities, and more.

Although WebEOC and its product suite provide specialized tools for managing crisis information and emergency response, it can be used to manage any and all events, agencies, organizations, etc.

WebEOC includes a default set of boards and plug-ins that enable any agency to begin using it almost immediately. An agency can use any or all of the boards as-is, or build an unlimited number of boards and forms tailored to local requirements. Within the context of WebEOC, a board is an electronic display that allows you to transmit and share information in real-time among other WebEOC users. WebEOC boards are the equivalent of large, chronological, or topical paper-based boards that, for years, dominated every EOC and command center around the world.

Background

WebEOC was one of the first web-enabled CIMS systems developed for emergency management. WebEOC is designed to make crisis information universally available to authorized users everywhere. It is a tool that can be configured based on local requirements, while giving agencies the ability to link to a wide assortment of different systems.

As a web-based product, WebEOC ushered in the era of “virtual” EOCs, making it possible to monitor and manage an emergency response from anywhere in the world.

WebEOC can be used during the planning, mitigation, response, and recovery phases of any emergency. It can also be used by agencies during day-to-day activities to manage routine, non-emergency operations.

WebEOC's design is based on the following tenets of emergency information management systems. CIMS should:

- Be affordable.
- Be user-friendly.
- Be easy to maintain by existing EMA staff with access to the vendor's technical support.
- Be easy to configure and tailor to the conditions of the agency.
- Allow for remote access by authorized users located outside the local area network (LAN).
- Comply with the provisions for the Incident Command System (ICS).
- Support users who implement both ICS and Emergency Support Functions (ESF) structure.
- Integrate with other systems such as mapping and other CIMS and telephonic alert notification systems.
- Integrate public health into emergency management.
- Operate within a variety of network configurations.
- Have a wide range of features consistent with the four phases of emergency management.
- Have help desk support on a 24-hour basis.

Initially introduced in 1997, WebEOC was the first web-based, commercial-off-the-shelf CIMS system used for emergency management.

As a tool, WebEOC can be configured locally and tailored to almost any process. The default status boards that come with WebEOC are summarized in this help system and detailed in the *WebEOC User Manual*. These status boards can be implemented as-is or they can be modified locally. Status boards can also be built using standard tools within WebEOC or external HTML editors.

Overview

This help system provides detailed instructions on setting up and managing groups, positions, users, incidents, links, lists, master views, and menus. It explains how to assign and restrict user privileges and details how to build checklists, status boards, exercise simulations, and reports. It also covers plug-ins such as Checklists, File Library, Messages, and MapTac. Board building and HTML skills are also covered.

Intended Audience

This manual is written for WebEOC administrators and is not intended for the average user. WebEOC users and administrators should refer to the *WebEOC User Manual* for detailed user instructions. However, users can be assigned administrative rights and privileges. In these cases, users with administrative privileges may need to refer to this manual.

Basic Features

As already noted, WebEOC is designed to make crisis information available to authorized users everywhere. More importantly, it is a tool that can be customized based on local requirements while giving agencies the ability to link to a wide assortment of different systems. WebEOC can be used during the planning, mitigation, response, and recovery phases of any emergency. It can also be used by agencies to manage day-to-day activities or routine, non-emergency related events.

WebEOC includes a default set of status boards and plugins that enable any agency to begin using WebEOC almost immediately. An agency can use any or all of the boards as-is or build an unlimited number of status boards and forms tailored to local requirements. Within the context of WebEOC, a status board is an electronic display that allows you to transmit and share information in real-time among other WebEOC users. WebEOC status boards are the equivalent of large, chronological, or topical paper-based boards that, for years, dominated every EOC and command center around the world.

Time Conventions

WebEOC stamps all entries with a time and date. It also tracks and displays who entered the information.

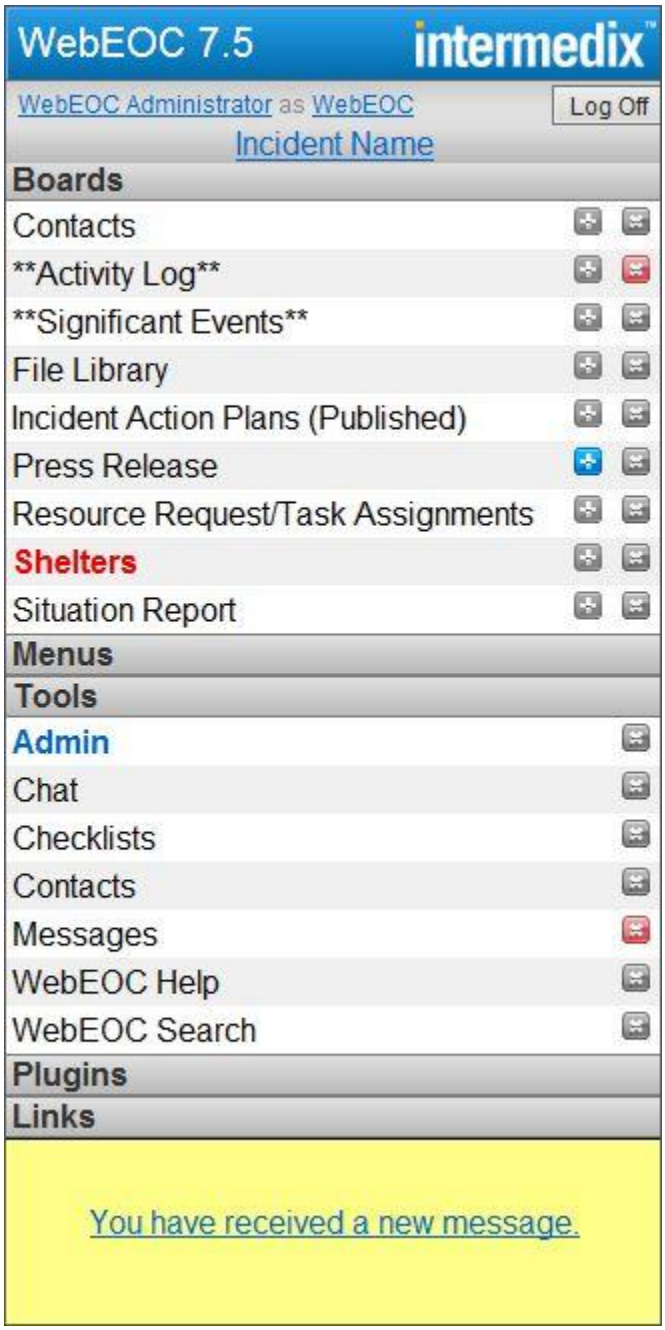
Entries appear in status boards in the order in which they are entered into the system. For example, if a telephonic report is received at 10:00 p.m. and it is entered into WebEOC at 10:01 p.m., the system time will be 10:01 p.m.

Agencies can determine whether or not to show system times as part of the displayed entry. During setup, administrators can add additional time fields to status boards that can be user-modified; these times could represent a time the incident occurred, actual time of receipt, etc. These additional time fields, if used, are separate from the unalterable system time. Normally, agencies enter a time of receipt, time of occurrence, etc., in the narrative description.

Getting Started

WebEOC Control Panel Overview

The control panel is the information hub in WebEOC. It contains boards, menus, tools, plug-ins, links, message notifications, and more. Users will only see items on their control panel that you have granted them access to.



The control panel is the interface to administrator functions and lists the boards, menus, tools, plug-ins, and links a user has access to. The features that are available are determined by the version of WebEOC and the plug-ins that you have installed.

The control panel provides access to the following.

Status boards, menus, tools, plug-ins, and links can be opened by selecting the name which acts as a link.

The input button (the blue plus sign) next to a status board opens a New Record window. This New Record window is called the input view. It contains tools to manage and post information to a board.

The admin link allows you access to WebEOC administrator functions. Only users with administrative privileges will have the Admin link on their control panel.

Use the Log Off button to exit WebEOC.

Within the control panel, boards, menus, tools, plug-ins, and links appear alphabetically in their respective groups. The boards can be reorganized using the Board Options feature in the Boards manager. The control panel, components, and functions are described in detail in the *WebEOC User Manual*.

All WebEOC windows (for example, control panel, boards, links) may be resized using standard Windows® functions and moved to any position on the desktop.

The names of boards change to a red font to alert users when new data has been posted to a status board. Each time a user logs in to WebEOC, the font for any status board containing new data will appear red. Once the status board has been opened, the font will reset to black until new information has been added or existing information has been updated.

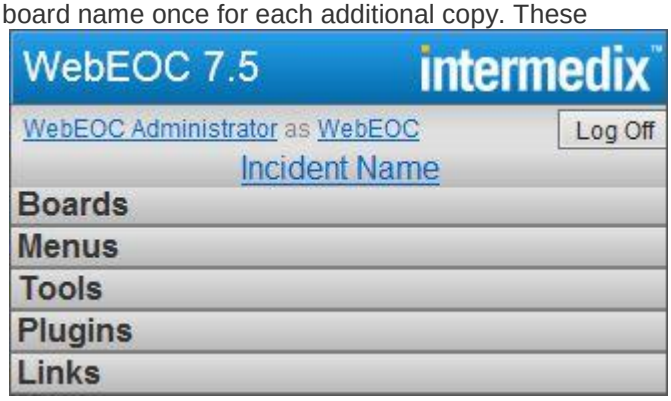
You can create tiered menus and add them to the control panel. Menus can contain status boards, plug-ins, links, or other menus. When accessed, the menu opens in a separate window with the same look and functionality as the control panel.

Menus are located on the control panel in the Menus section. The double-arrow symbol beside the menu name indicates the menu contains items. Items contained in the menus follow the same convention and behavior as status boards. Updates to a status board contained in a menu cause the font of the name to turn red. Once the status board containing new data has been opened through the menu window, the font on the control panel will reset to black.

Users may close a status board, menu window, plug-in, or link by either selecting the “X” in the upper right corner of the window or by selecting the “X” next to the status board name on the control panel. WebEOC remembers the position and size of the board and menu windows when closed, allowing them to appear in the same position and size when reopened.

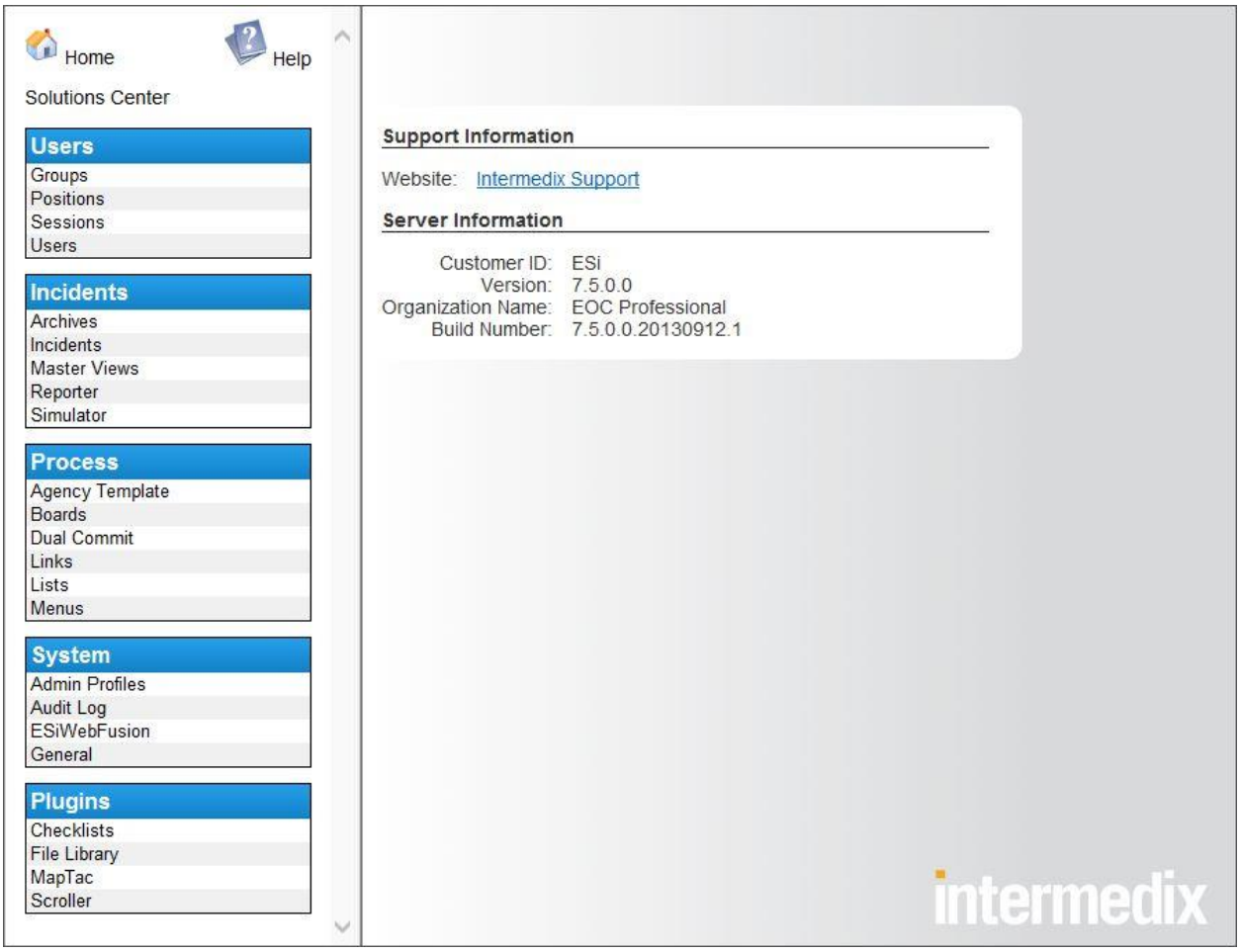
Multiple status boards and/or multiple copies of a status board, plug-in, or link may be opened for simultaneous display. This feature allows you to display these windows on one or more monitors or displays. Only one instance of a Menu can be opened at a time. After a display has been opened, additional copies can be opened by selecting the board name once for each additional copy. These displays can then be positioned as desired.

Sections on the control panel can be collapsed in order to save space on your desktop.



Admin Manager Overview

The Admin link is available in the Tools section of the control panel. (See the WebEOC Control Panel Overview topic.) When this link is selected, the Admin window opens, providing access to managers. The right pane of the Admin window contains support and server information. The left pane of the Admin window contains the Users, Incidents, Process, System, and Plugins sections that house the managers. The sections are collapsible and expandable.



Each manager is described in detail in a dedicated topic of this web help. Following below is a synopsis of each of the admin managers listed by topic.

The Users topic contains the following managers.

- **Groups:** This manager allows you to create groups and establish access privileges to boards, links, menus, and plug-ins that will appear as links on a user's control panel.

- **Positions:** With this manager you can assign users to positions in WebEOC and create and manage position access codes (PACs) for self-registration by users.
- **Sessions:** This manager lists users currently logged in to WebEOC and allows you to terminate user login sessions.
- **Users:** User names and passwords are used to gain access to WebEOC and are configured through the Users manager.

The Incidents topic contains the following managers.

- **Archives:** The Archives manager provides access to archived incident data for reporting and viewing. It also allows archived incidents to be converted into a simulation and loaded into the Simulator manager. You can then run reports to assist with the creation of after-action reports/improvement plans, critique incidents, and edit an archived incident to run as an exercise.
- **Incidents:** This manager allows you to set up incidents to track and relay information specific to the incident.
- **Master Views:** Multiple incidents can be added to a master view. Logging in to a master view allows you to see all the incidents that have been added to that view. Use the Master View Manager to add new master views, edit existing master views, or delete unwanted master views.
- **Reporter:** The Reporter manager can be used to create pre-formatted or ad hoc reports that can then be added as links to the control panel.
- **Simulator:** The Simulator manager allows scenario injects to be created and manually or automatically posted to the appropriate status boards during a drill or exercise.

The Process topic contains the following managers.

- **Agency Template:** The Agency Template feature allows you to define a default template for your board and system options. The Board Templates, similar to applying a skin, allows you to select an agency name, logo, color, and font scheme to apply to each board. You can also add a policy message to the WebEOC Login window.
- **Boards:** The Boards manager allows you to locally design, create, and maintain an unlimited number of displays (boards and forms).
- **Dual Commit:** This manager allows for the setup and configuration of remote WebEOC servers to which data from the local WebEOC server can be posted.

- **Links:** In the Links manager, you can set up and configure hyperlinks to URLs, other systems, or files.
- **Lists:** This manager creates and manages lists of items that users can select when updating certain fields on status boards and forms.
- **Menus:** This manager allows you to group boards, links, plugins, or other menus in any combination under a single link (menu) on the control panel.

The System topic contains the following managers.

- **Admin Profiles:** Admin profiles establish a predefined set of specific administrator privileges that can be applied as a template to a group of users. You can add, edit, or delete admin profiles in the Admin Profiles manager.
- **Audit Log:** The Audit Log tracks, records, and displays (in a predefined format) events that have occurred in the WebEOC system. The Audit Log manager allows you to view user login Information and clear the Audit Log. The search feature allows you to search for specific log ins.
- **ESiWebFusion:** The ESiWebFusion manager allows you to set up and manage your ESiWebFusion connection.
- **General:** The General manager provides access to security options, email servers, and more.

The Plugins topic contains the following managers.

- **Checklists:** Procedures and checklists can be automated and used from within WebEOC during the course of an incident. Use the Checklist manager to add checklists, assign groups to checklists, or attach files to checklists.
- **File Library:** The File Library manager allows you to manage folders and assign permissions.
- **MapTac:** The MapTac manager allows you to choose maps, markers, and tabs that will be available to users using the MapTac plug-in.
- **Scroller:** The Scroller feature enables users to view the latest data for a select set of boards on a timed interval in a single window. The Scroller manager allows administrators to select the boards they want to scroll and set the time intervals for those boards.

Help and Solutions Center

Accessing WebEOC Online Help For Administrators

A WebEOC Help file system is available for you to access specific instructions or information on all the WebEOC features, the standard plugins, and detailed instructions on the Admin managers. As with most online help systems, you can select a specific topic or task, use an index and search on a keyword, or search on any topic or word to find the information or instructions you need.

To access WebEOC Help, select the Help icon located at the top on the left pane of the Admin window. A separate window will open to the online help welcome page. Only users with administrative privileges can access this online help feature. A separate WebEOC Help is available to all other users.

Solutions Center

The Solutions Center is an online storefront that contains Intermedix-certified status boards that can be downloaded directly into your WebEOC. In addition to status boards, you can browse the catalog of standard and enterprise plug-ins, and solution services.

Select the Solutions Center link in the admin window to open the Solutions Center in the information pane. From the admin window, you can browse Solutions Center, or log in to Solutions Center and download status boards.

The Solutions Center link will appear red if new offerings have been added to the storefront since your last visit.

Standard Plug-ins

The following plug-ins come with a standard installation of WebEOC. See the *WebEOC User Manual* for detailed instructions on using plug-ins.

Plug-in	Description
Calendar	This built-in plug-in allows users to track drill and exercise schedules, training sessions, meetings, etc.
Checklists	This plug-in allows you to enter incident-specific checklists that users will complete. Steps can be identified as main steps or sub-steps and can be easily ordered and reordered using arrow buttons. Steps and sub-steps can be marked as Complete, Open, Previously Accomplished, or Not Applicable. When running a checklist, remarks can be added to a step and displayed or hidden as desired.
Contacts	This plug-in allows users to maintain and display contact information.
File Library	The File Library allows users to upload and share documents and files with other users through WebEOC.
Mapper Lite	Mapper Lite provides customers and organizations with the tools necessary to create a dynamic, geographically-based common operating picture.
MapTac™	MapTac allows an authorized user to upload an image file of a map, dispersion model, digital photo, etc., from any map, GIS source, or digital camera. Users can apply markers, labels, shapes, and/or polygons, and share the map with other users.
Messages	The Messages plug-in allows users to communicate with each other using an internal messaging link that is unique to WebEOC.
NWS Alerts	The NWS Alerts board allows users access to National Weather Service watches, warnings, and alerts.
Simulator	This plug-in allows a training official or an exercise controller to build, edit, and control delivery of exercise scenario injects into WebEOC status boards manually or auto-matically in real-time. With Simulator, you can manage your Master Scenario Events List (MSEL). Injects can be started, stopped, reset, added or deleted as necessary to meet training or exercise objectives. Additionally you can import injects from or export injects to an MS Excel Spreadsheet.
Reporter	Within WebEOC, agencies can generate pre-formatted or custom reports based on individual status boards. They can also generate a comprehensive incident report consisting of individual or all status boards in an agency's WebEOC. Because WebEOC uses Microsoft® SQL Server® for the database, customers can use Access, Crystal, or other tools to generate reports.
WebEOC Help	WebEOC Help is a plug-in available for all users. It can be accessed from the control panel in the Tools section. No administrative instructions or information can be accessed in this plug-in. A separate WebEOC Help (icon located at the top of the Admin manager window) is available to administrators.

Additional Plug-ins

The following plug-ins are available separately for purchase from Intermedix to add additional functionality to WebEOC.

Plug-in	Description
Mapper Professional	Mapper Professional is the geographic information system (GIS) interface between Intermedix's WebEOC and ESRI ArcGIS® that allows users to view data from WebEOC status boards on the same map. This plug-in is built in to WebEOC.
Passenger Data	With the Passenger Data, users can record, administratively track, and maintain passenger information within their organization during and after a response.
Resource Request and Deployment Module	The Resource Request and Deployment Module enables users to catalog, track, and deploy resources in a man-ner that complies with FEMA's National Incident Management System (NIMS).
Team Manager	Team Manager allows users to accurately manage and deploy response personnel within their organization.

Status Boards

The *WebEOC User Manual* explains how to use WebEOC status boards. The following table summarizes a typical set of status boards. The set of status boards outlined in the table below is available with the Professional, Air, ST, and WebEOC for Hospitals versions of WebEOC.

Board	Description
Activity Log	The Activity Log gives users a method of documenting actions taken by the personnel in the EOC.
After Action Review	The After Action Review (AAR) board allows users to document comments and recommendations after an event, and track resolution of items.
Chat	Agencies can implement chat rooms within WebEOC thereby providing users with an informal method of communication.
Checklist	With the Checklist board, users can create, edit, and view a chronological list of specific items they have completed during an incident.
Contacts	The Contacts board allows users to enter detailed contact information that can be shared or kept private.
Damage Assessment	Users can track detailed information on the cumulative dollar loss due to damage to private and public properties.
File Library	The File Library allows users to upload, organize, and share documents and files.

Hospitals	This board provides user-detailed information on hospital statuses.
Incident Action Plan	The Incident Action Plan board contains the IAP Builder and Incident Action Plans (Published) board views. Users can create, edit, and publish plans for specific operational periods in accordance with the ICS forms.
Logged In	This board displays a list of users currently logged in by user name or position.
Press Release	The Press Release board is a repository for press releases that have been published. Users can post a description with the attached press release.
Resource Request/Task Assignments	This board allows users to enter requests or tasks, and post updates on the status of tasks and requests.
Road Closures	This board enables users to document and track specific details on road status, location, damage, and suggested detour.
Shelters	This board allows users to track the status of shelters.
Situation Report	This board provides a standard format for publishing a summary report based on two common methodologies: ICS or ESF.
WebEOC Search Tool	The WebEOC Search Tool allows users to search for information contained within boards.

Users

The Groups Manager

In WebEOC, group profiles provide administrators a quick and easy method of assigning access privileges to boards, plugins, links, and menus via the control panel. These group permissions are normally based on the duties performed, positions assumed, and information required during the course of an incident. Each user in WebEOC is assigned to a position which can then be assigned to a group. Because group privileges also determine what is displayed on the control panel (boards, menus, tool, plug-ins, and links), even single-user positions must be assigned to a group.

In addition to defining the contents of the control panel, a group profile provides administrators an additional method to set up, apply, and manage user permissions (read only, read/write, or read/write/delete) that are applied to the positions assigned to the group. When a position is assigned to two or more groups with differing permissions, the users assigned to that position will inherit the combined least restrictive privileges of the groups.

Organizational groups allow system administrators to establish a local process for creating, reviewing, assigning, and tracking mission and task requests in WebEOC. Members of these internal organizational groups can be assigned process permissions which give them tasking and/or requesting capabilities. Since administrators can place limits on who the user can task and what they can view, utilizing organizational groups can eliminate structural miscommunication and duplication of tasks.

Permissions for a user are also determined by the administrator profiles to which they belong. Users assigned to multiple groups and administrator profiles will have the least restrictive permissions from each. If a user needs some administrative privileges, but not all administrative privileges, specific administrative permissions can be configured for the user through the *Admin Profiles* manager.

See the *System* topic for detailed instructions on the permissions features located in the *Admin Profiles* manager.

Planning a Group

Before creating a new group, you should determine the group's information and permission requirements. Answer the following questions before creating a new group.

- Is there an existing group or set of groups with the proper permissions that would meet the needs of the users? Does a new group need to be created?
- Which positions will be assigned to the group?
- Which incidents will the group need to be granted access to?
- Are process permissions to be assigned to the group?
- Which boards, links, menus, and plug-ins will the group need access? (These items will appear on the users' control panel.)
- For each component the group is granted access, what privileges will they require (read only, read/write, or read/write/delete)?

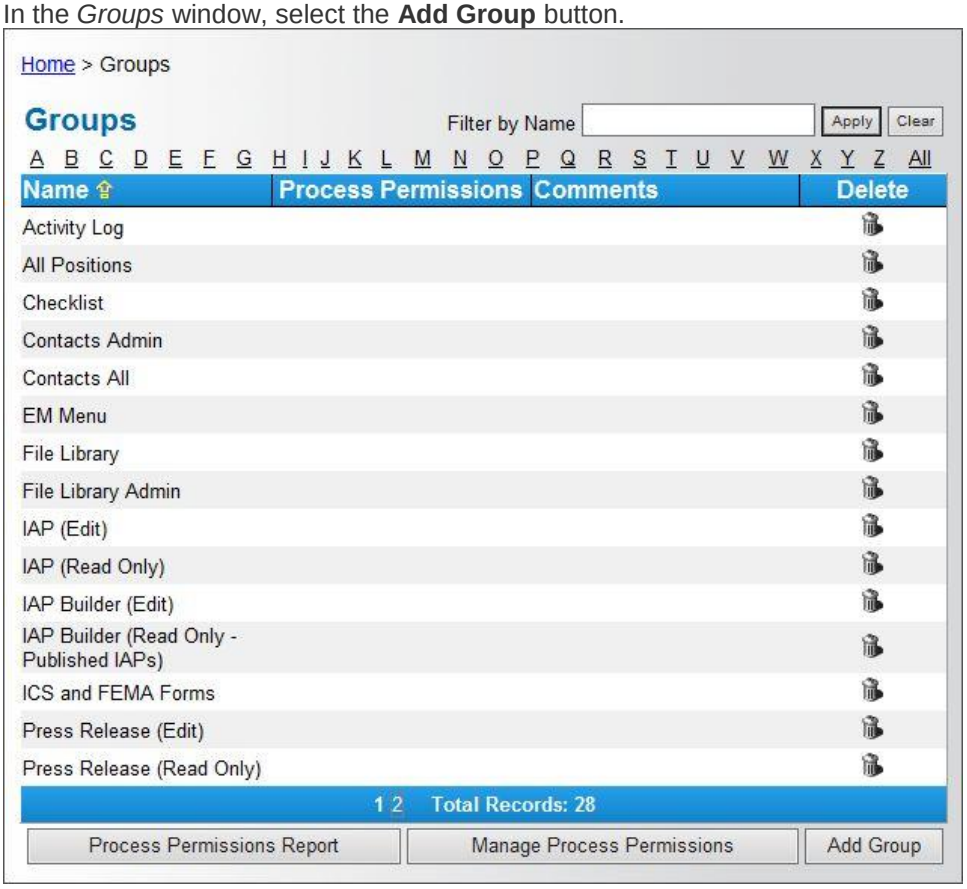
Adding a New Group

The *Edit Group* window allows you to create a group and add positions, incidents, boards, plug-ins, links, and menus to the group. The group name is the only required field/option. You can save the group at any point during the group setup process.

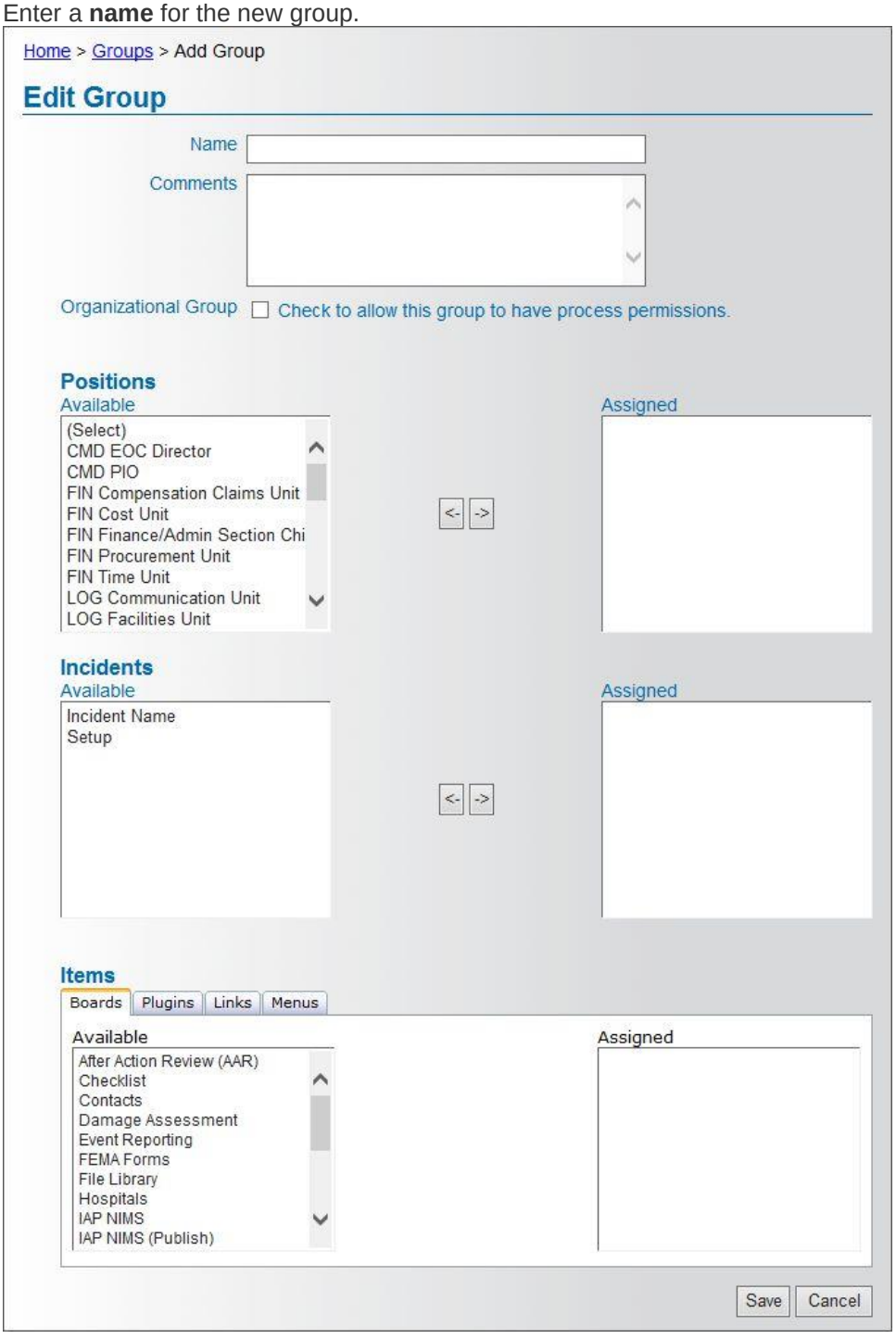
To add a new group, follow the steps below.

1. Select the **Groups** link in the *Users* section of the admin window.

2. In the *Groups* window, select the **Add Group** button.



3. Enter a **name** for the new group.



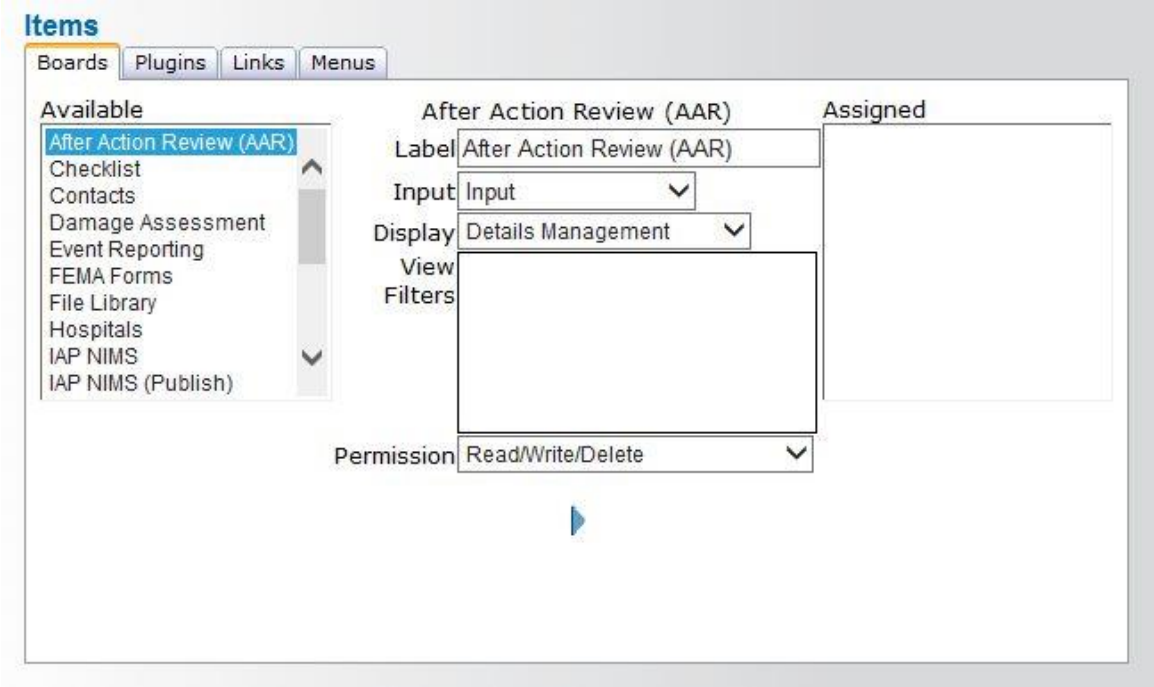
4. In the *Comments* field, enter a **description** or additional information about this group.

5. Select the **Organizational Group** check box if the group will participate in the local process of creating, reviewing, assigning, and tracking mission and task requests.

6. In the *Positions* section, assign a position to the group by selecting the **position** from the *Available* list, and selecting the **right arrow** to move the position to the *Assigned* list. To remove a position from the *Assigned* list, select the **position** in the *Assigned* list, and select the **left arrow**.

7. In the *Incidents* section, assign an incident to the group by selecting the **incident** from the *Available* list, and selecting the **right arrow** to move the incident to the *Assigned* list. To remove an incident from the *Assigned* list, select the **incident** in the *Assigned* list, and select the **left arrow**.

8. In the *Items* section, select the **Boards** tab, and select the **board** from the *Available* list. When the board is selected, label, input, display, filter, and permission options appear between the *Available* and *Assigned* lists. (Filters do not apply to all of the boards.)



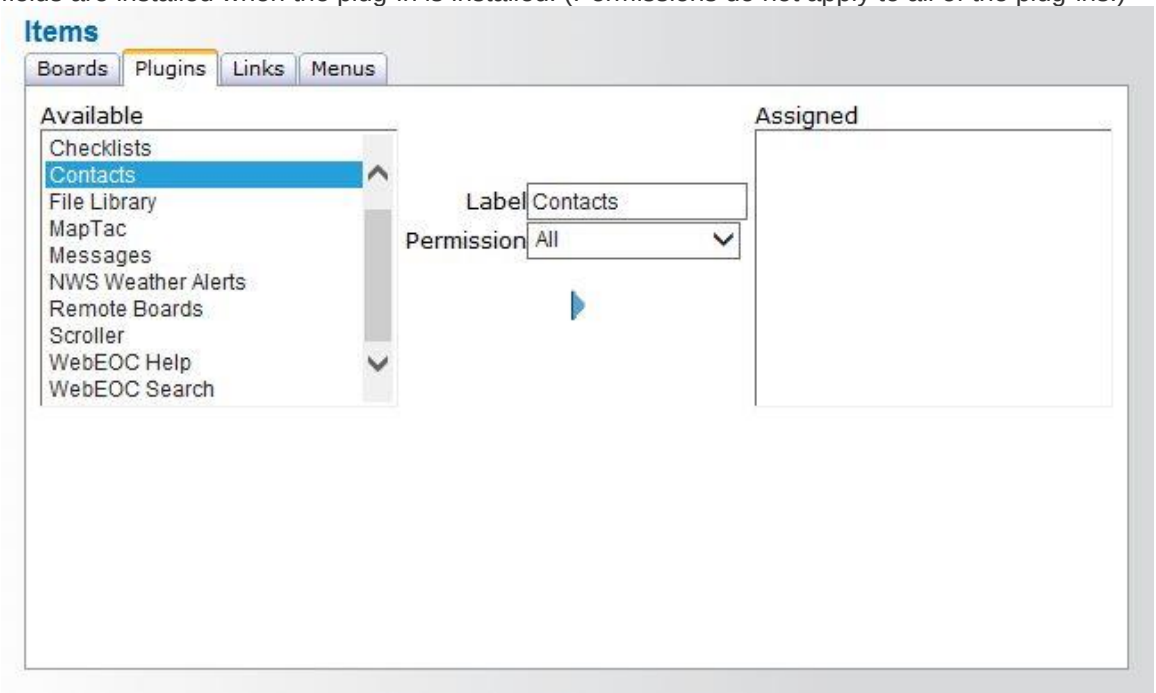
Note: The Input and Display drop-down lists contain the views configured in the Boards manager. Changes made in the Boards manager will automatically appear in the Groups manager. See the Process topic for detailed instructions on features located in the Boards manager.

9. The *Label* field defaults to the board name set up in the *Boards* manager. To change the label to an alias to be displayed on the control panel, delete the text, and type a **new name** for the board.

10. Select the **input view** from the *Input* drop-down list. To disable the board's input view, select **None**. If *None* is selected, users in this group will not be able to add information to the board using the input button on the control panel.

Note: Data entry may be available through a display that has a data entry feature enabled.

11. Select the **display view** from the *Display* drop-down list. To disable the board's display view, select **None**. If *None* is selected, users in this group will not be able to view the board.
12. Select the **check box** next to the filter or filters you want to apply to this board for this group. If multiple filters are selected, only those entries meeting all of the criteria selected will be applied to the display.
13. Select the **permissions** (read only, read/write, or read/write/delete) you want the group to have from the *Permission* drop-down list.
14. Select the **right arrow** to move the board to the *Assigned* list.
15. Repeat these steps for each board you want users in this group to have access.
16. In the *Plugins* tab, select a **plug-in** from the *Available* list. When a plug-in is selected, a Label field and Permission drop-down list appear between the *Available* and *Assigned* lists. These fields are installed when the plug-in is installed. (Permissions do not apply to all of the plug-ins.)



17. The *Label* field defaults to the plug-in name. To change the label to an alias to be displayed on the control panel, delete the text, and type a **new name** for the plug-in.

18. If the *Permission* field is available, select the **permission level** from the *Permission* drop-down list. Permissions for each plug-in will vary.

    a. **Chat Plug-in:** If *View/Edit* is selected for the *Chat* plug-in, the user will be able to add a chat room, assign and clear passwords, and delete a chat room. When View Only is selected, users can send text messages back and forth, but cannot add or delete chat rooms or assign or delete passwords.

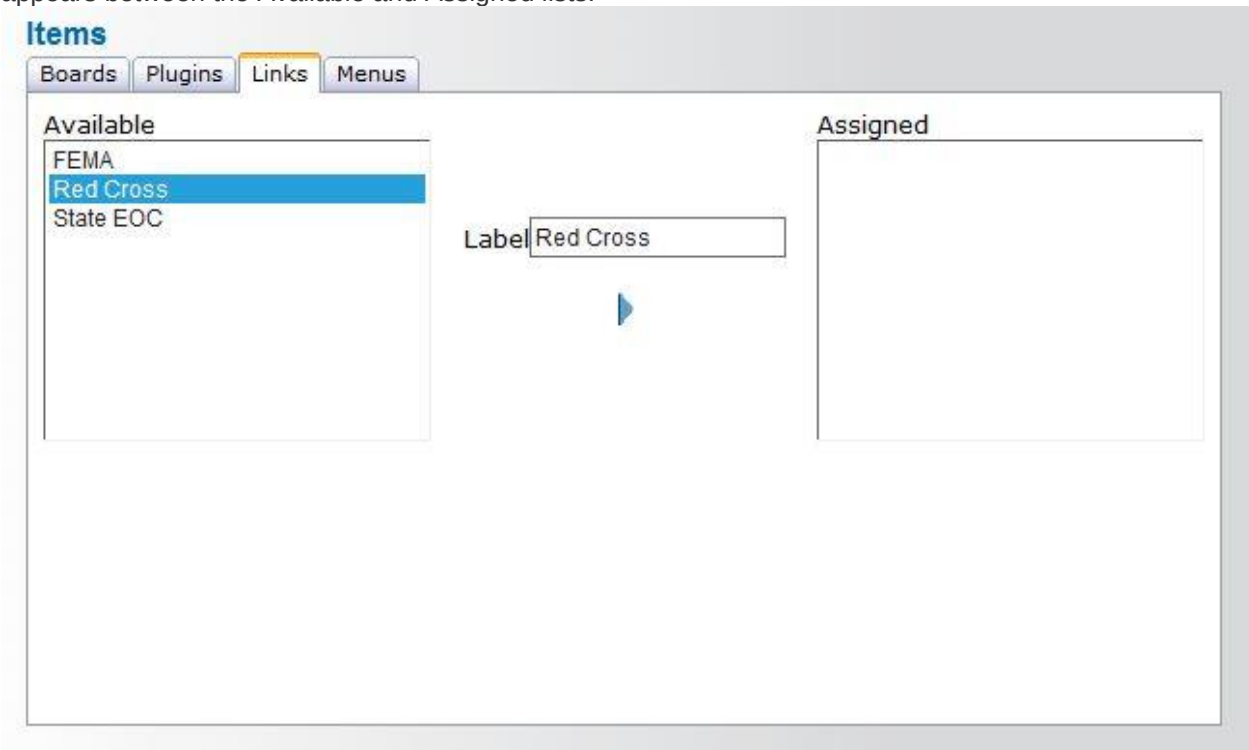
    b. **Contacts Plug-in:** In the *Permission* field for the *Contacts* plug-in, select either **Restricted** or **All**. Restricted allows users to add new contacts, modify contacts that they have added, and view contacts set as *Do not hide from restricted users* in the *Contacts* plug-in. Contacts set as **Hide** from restricted users will not display in the *Contacts* list for users assigned *Restricted* permissions. All gives users full access and capability to add new contacts, modify contacts they have entered, and view contacts designated as either *Hide from restricted users* or *Do not hide from restricted users*.

Note: Hide from restricted users and Do not hide from restricted users are settings that can be selected when adding a contact in the Contacts plugin.

    c. **MapTac Plug-in:** In the *Permission* field for the MapTac plug-in, select either **View Only** or **Edit Markers**.

19. When options for each plug-in has been set, select the **right arrow** to add the plug-in to the *Assigned* list.

20. In the Links tab, select the link from the Available list. When the link is selected, a label field appears between the Available and Assigned lists.

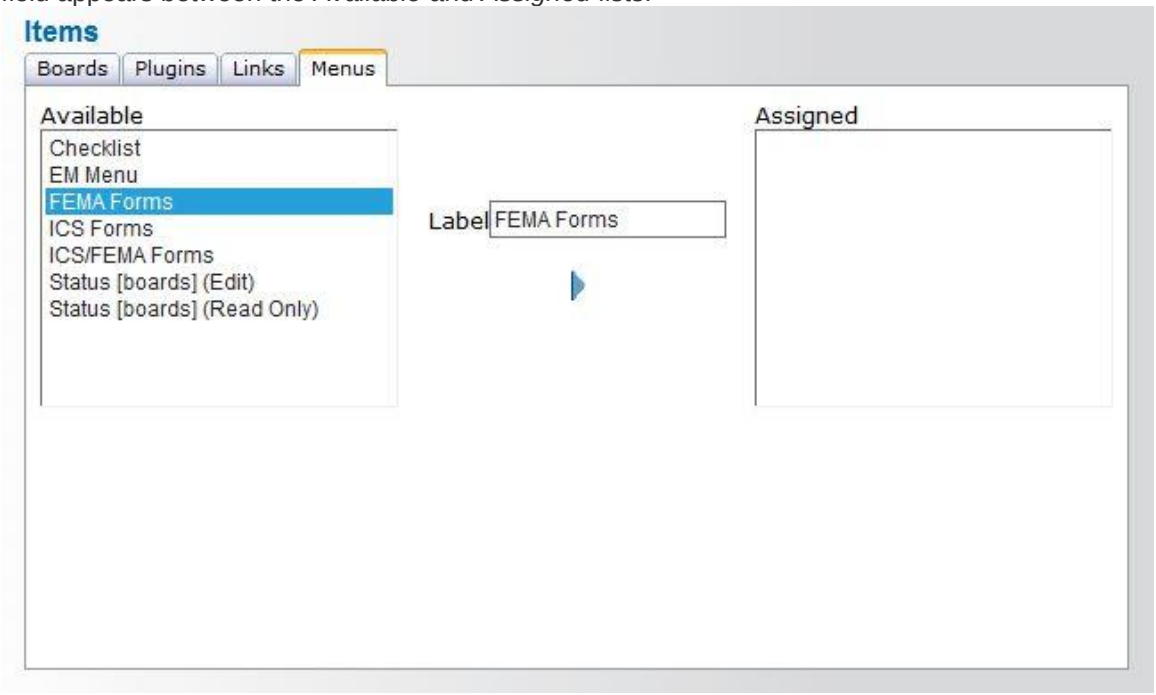


Note: The links available for selection are created in the Links manager. See the Process topic for detailed instructions on the Links manager.

21. The *Label* field defaults to the name set up in the *Links* manager. To change the label to an alias to be displayed on the control panel, delete the text, and type a **new name** for the plug-in.

22. Select the **right arrow** to add the link to the *Assigned* list.

23. In the *Menus* tab, select the **menu** from the *Available* list. When the menu is selected, a label field appears between the *Available* and *Assigned* lists.



Note: The menus available for selection are created in the Menus manager. See the Process topic for detailed instructions on the Menus manager.

24. The *Label* field defaults to the name set up in the *Menus* manager. To change the label to an alias to be displayed on the control panel, delete the text, and type a **new name** for the menu.

25. Select the **right arrow** to add the menu to the *Assigned* list.

26. Select the **Save** button to save the group, or select the **Cancel** button to abort the operation.

Note: To update the control panel, a user must log out and then log back in to WebEOC.

Editing an Existing Group

To edit an existing group, follow the steps below.

1. Select the **Groups** link in the *Users* section of the admin window.

2. In the *Groups* window, select the **name** of the group you want to edit.

3. To remove a board, plug-in, link, or menu from the group, select the **item** in the *Assigned* list (in each item's tab), and select the **left arrow** to move the item to the *Available* list.

Note: For additional information on fields located in the Edit Group screen, see the "Adding a Group" section in this topic.

4. When you are finished editing the group, select the **Save** button to save your changes, or select the **Cancel** button to abort the operation.

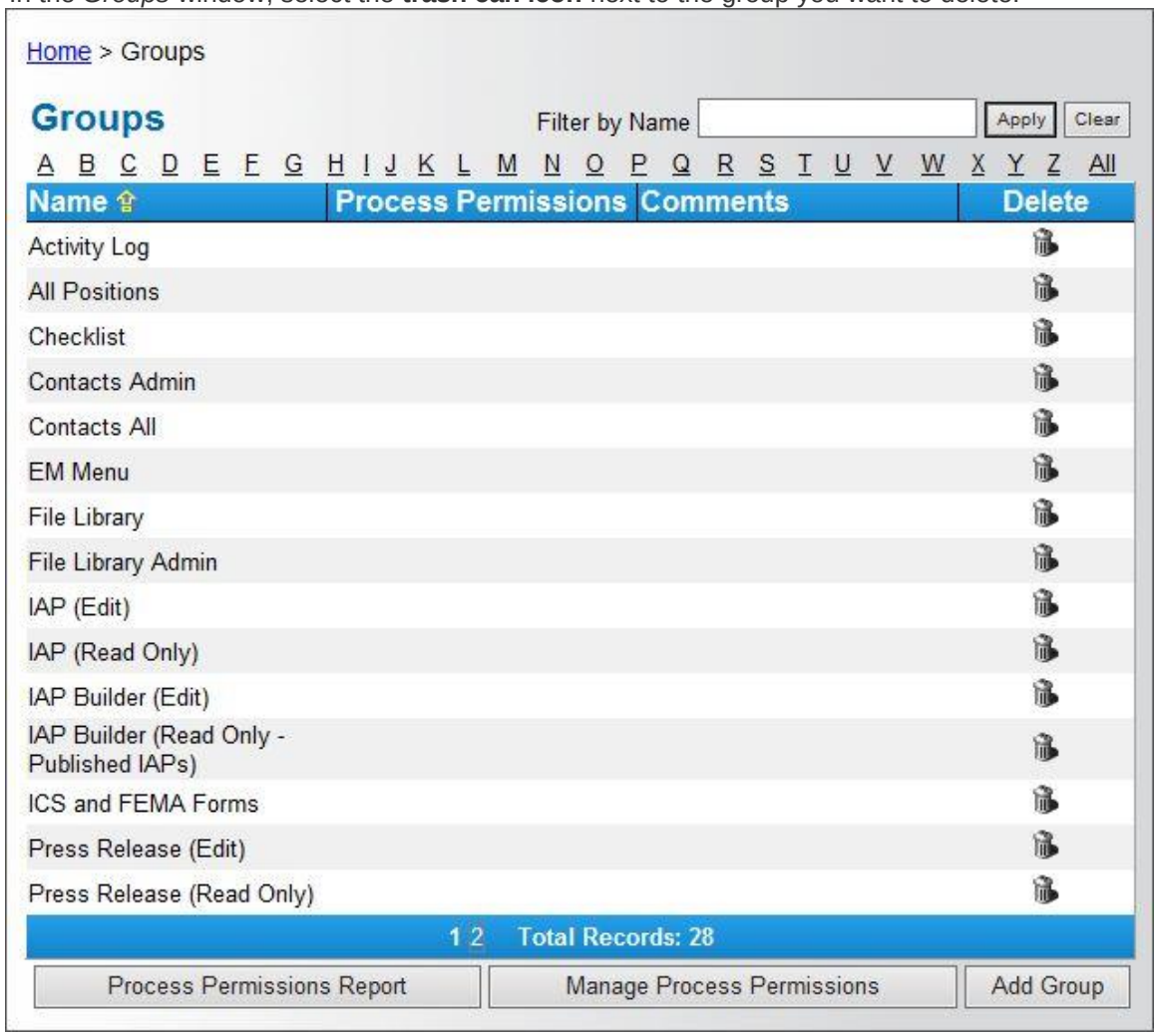
Deleting a Group

Before you delete a group, make sure the positions in the group are assigned to another group. Users in positions not assigned to a group will be able to log in to WebEOC, but they will be unable to access boards, menus, links, or plug-ins.

To delete a group, follow the steps below.

1. Select the **Groups** link in the *Users* section of the admin window.

2. In the *Groups* window, select the **trash can icon** next to the group you want to delete.



3. When the delete confirmation dialog box appears, select the **OK** button to permanently delete the group, or select the **Cancel** button to abort the operation.

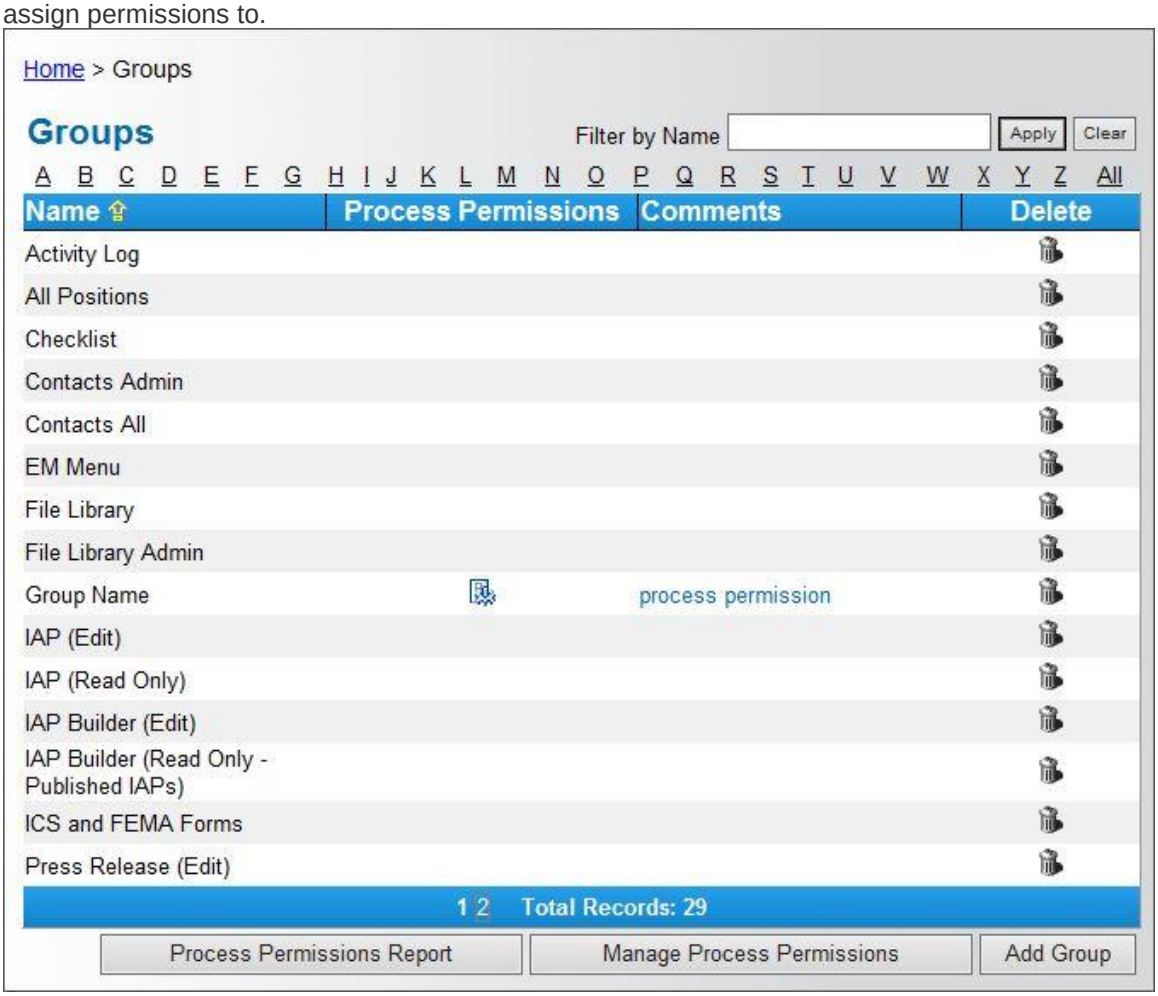
Assigning Process Permissions

If you selected the *Organizational Group* check box when adding or editing a group, process permissions will need to be defined for the group.

To assign process permissions for an existing group, follow the steps below.

1. Select the **Groups** link in the *Users* section of the admin window.

2. In the *Groups* window, select the **process permissions icon** next to the group you want to assign permissions to.



Note: Only groups that have the Organizational Group check box selected will be able to be assigned process permissions. The Organizational Group checkbox is located in the Edit Group window.

3. The process permissions window contains process permission categories created by selecting the Manage Process Permissions button. See the Adding a Process Permission topic in this help system for detailed instructions on adding a process permission category. To assign any of these items, select the **group name** from the *Available* list, and select the **right arrow** to move the group to the *Assigned* list.

4. Select the **Save** button to save the permissions, or select the **Cancel** button to abort the operation.

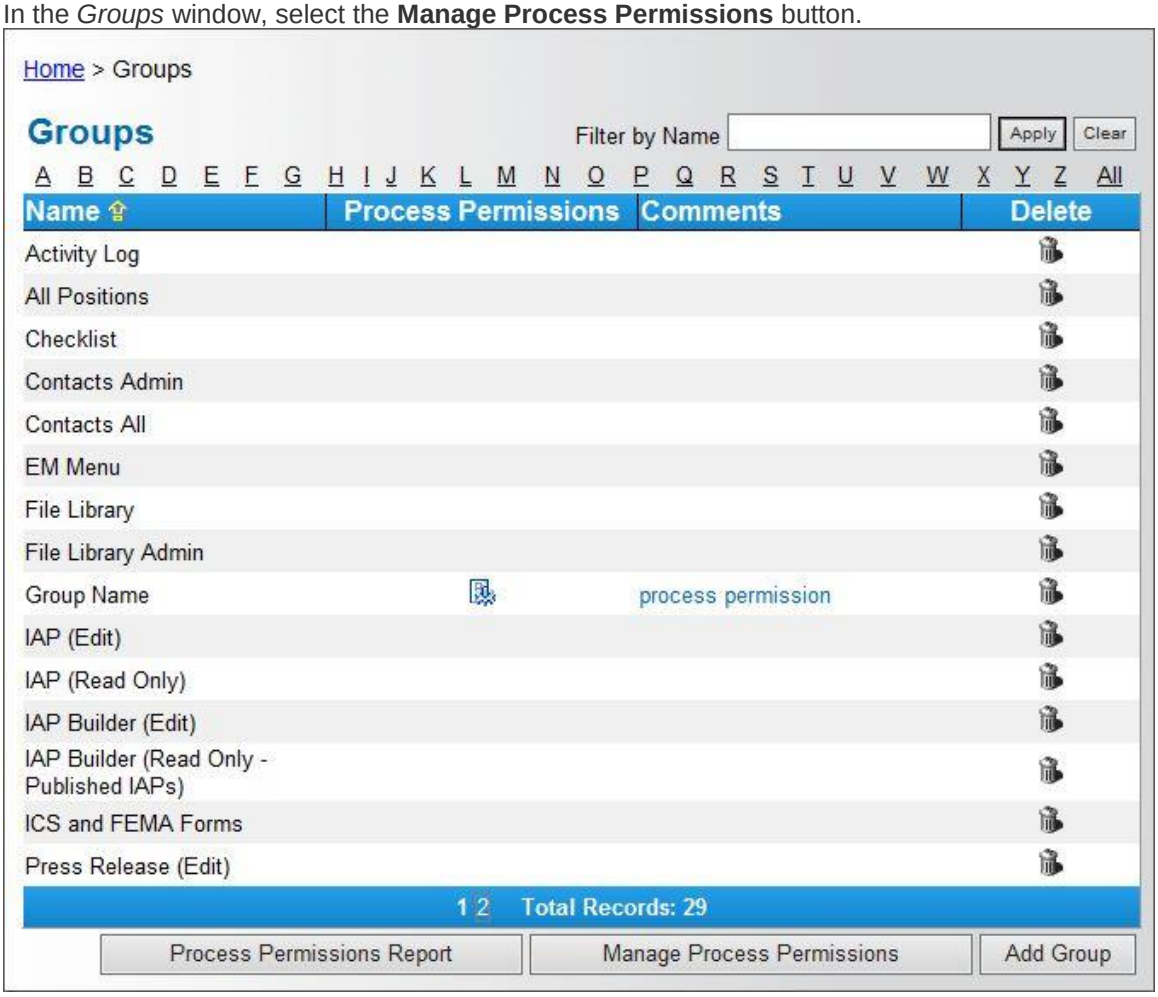
Adding a Process Permission

Administrators can manage as many processes as they need to support their organization. With the Manage Process Permission feature, administrators can add, edit, or delete any process a group will need. Situation reporting, publishing a press release, making requests or assigning tasking are only a few examples of the many processes that can be managed through WebEOC.

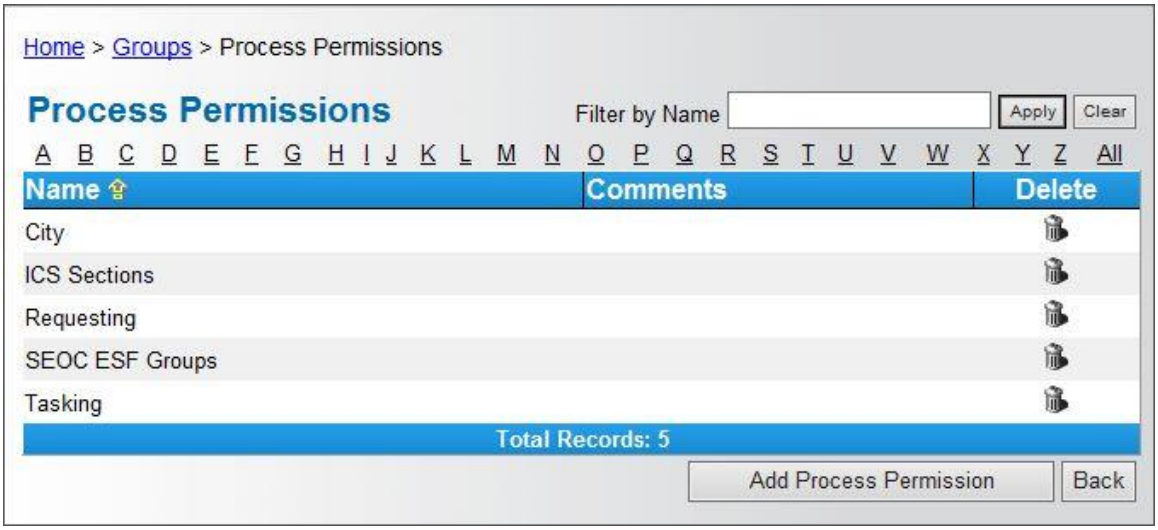
To add a process permission, follow the steps below.

1. Select the **Groups** link in the *Users* section of the admin window.

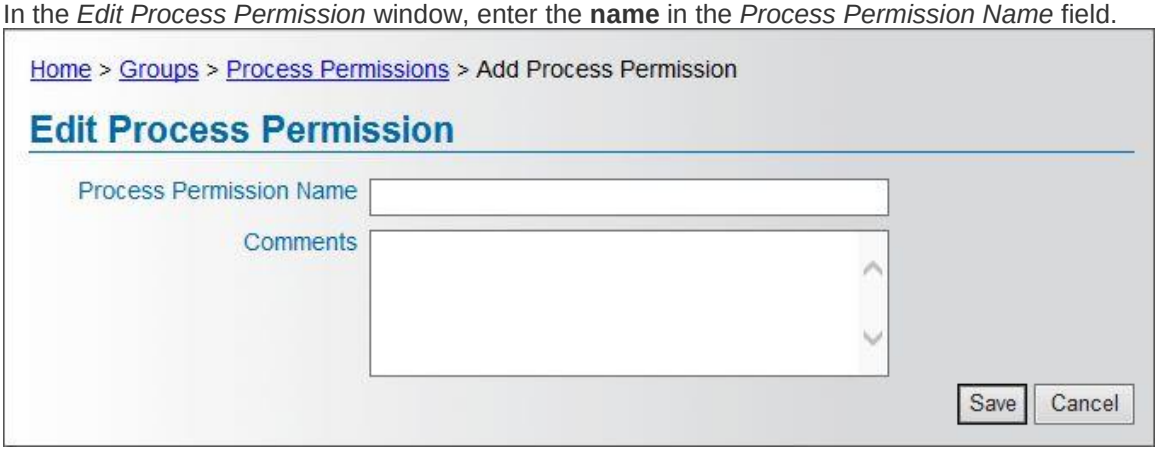
2. In the *Groups* window, select the **Manage Process Permissions** button.



3. Select the **Add Process Permission** button in the *Process Permissions* window.



4. In the *Edit Process Permission* window, enter the **name** in the *Process Permission Name* field.

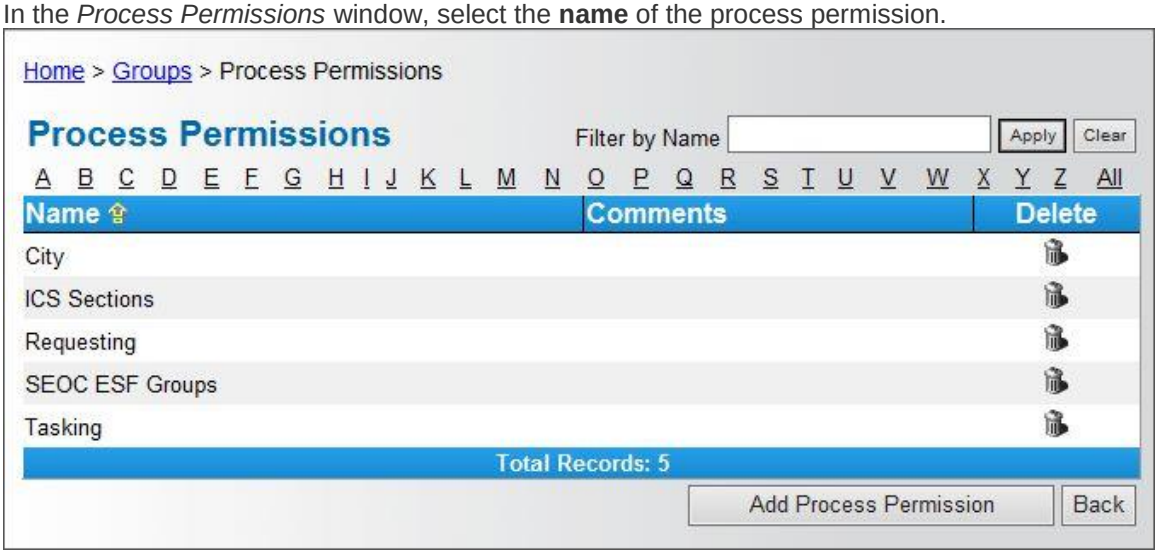


5. In the *Comments* field, enter a **description** or **additional information** about this process permission, and select the **Save** button.

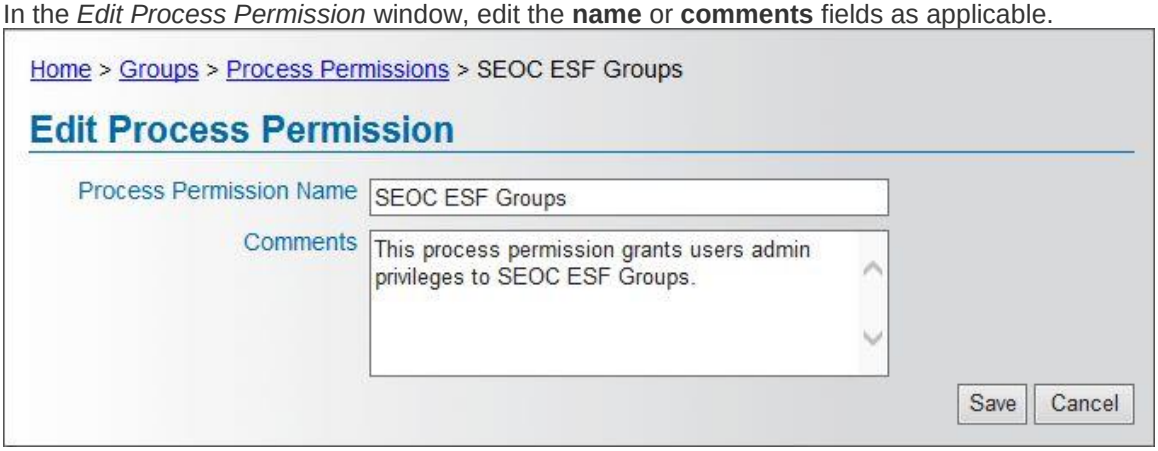
Editing a Process Permission

To edit a process permission, follow the steps below.

1. In the *Process Permissions* window, select the **name** of the process permission.



2. In the *Edit Process Permission* window, edit the **name** or **comments** fields as applicable.

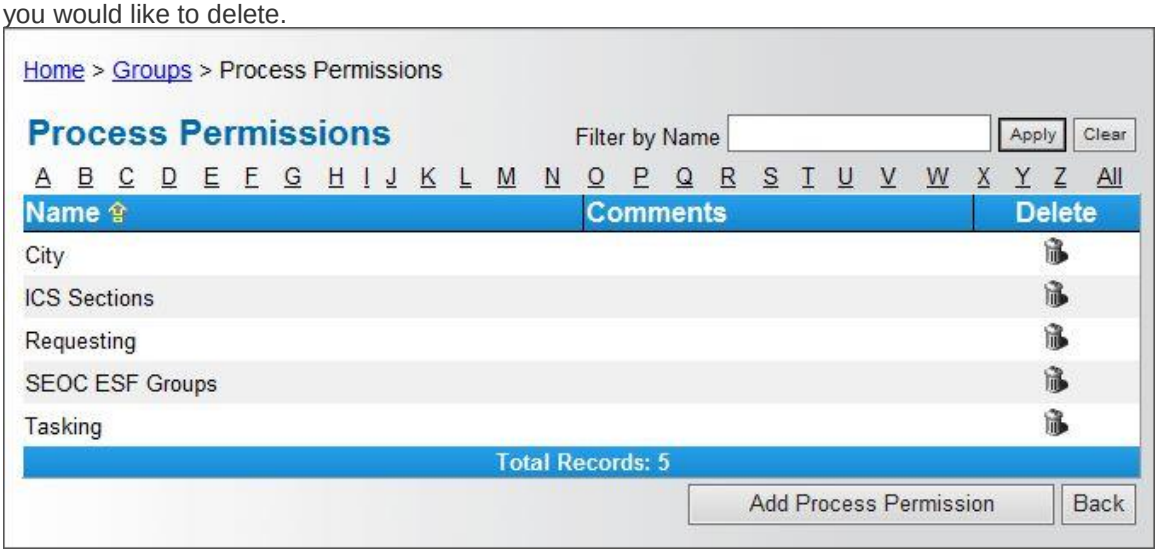

Home > Groups > Process Permissions > SEOC ESF Groups
Edit Process Permission
Process Permission Name
SEOC ESF Groups
Comments
This process permission grants users admin privileges to SEOC ESF Groups.
Save
Cancel

3. Select the **Save** button.

Deleting a Process Permission

To delete a process permission, follow the steps below.

1. In the *Process Permissions* window, select the **trash can icon** next to the process permission you would like to delete.



2. In the confirmation window, select the **OK** button to delete the process, or select the **Cancel** button to abort the operation.

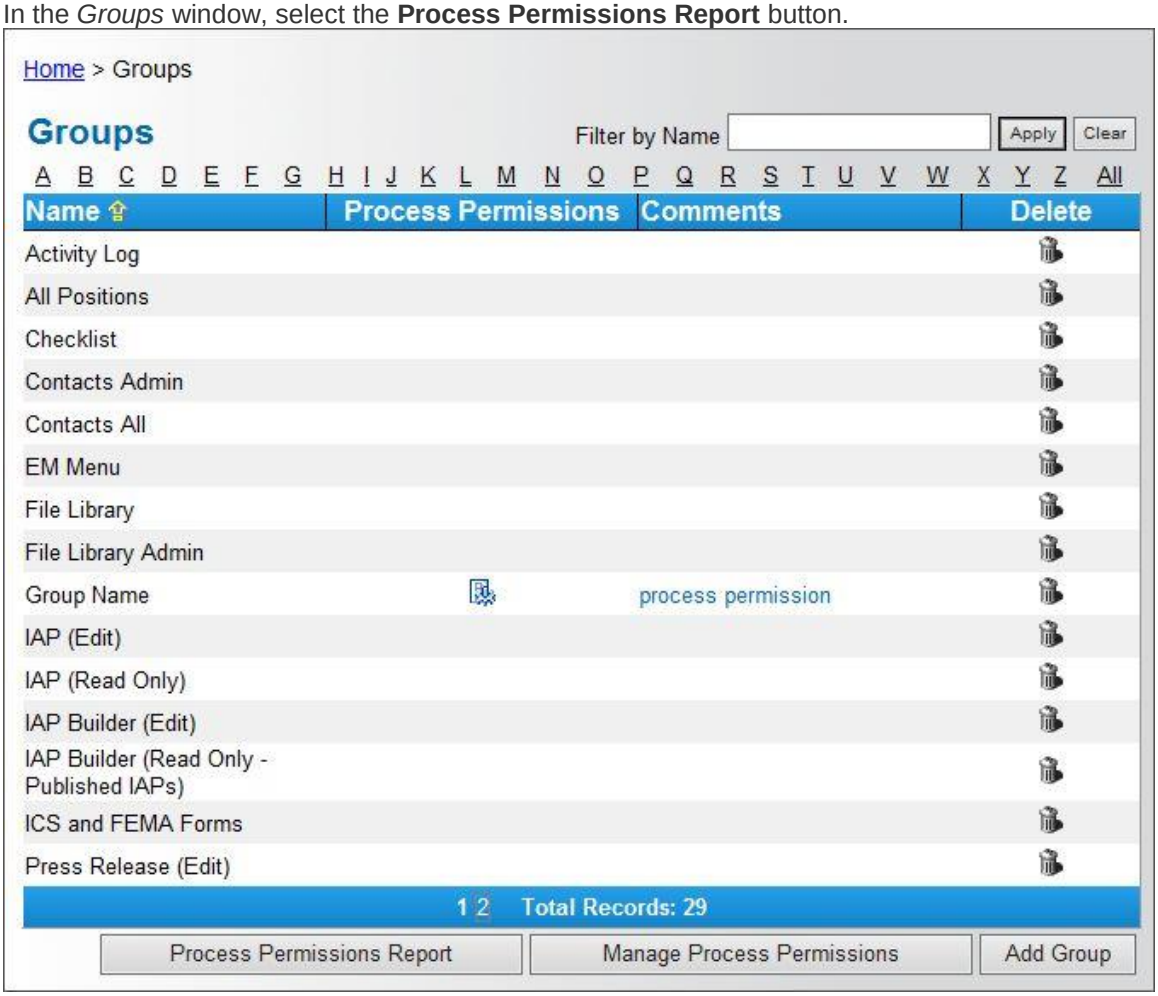
Viewing the Process Permissions Report

The Process Permissions Report lists all of the groups in your organization and the process permission assignments configured for them.

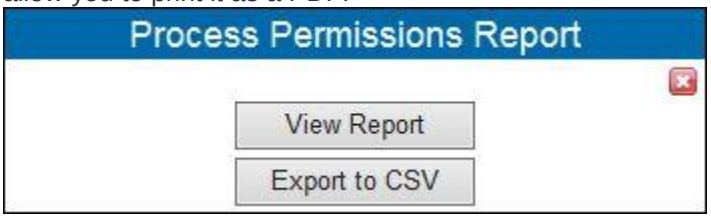
To view the Process Permissions Report, follow the steps below.

1. Select the **Groups** link in the *Users* section of the admin window.

2. In the *Groups* window, select the **Process Permissions Report** button.



3. In the *Process Permissions Report* window, select the **View Report** button to open the Process Permissions Report in a new window or select the **Export to CSV** button to export the Process Permissions Report in a CSV file. Opening the Process Permissions Report in a new window will allow you to print it as a PDF.



The Positions Manager

In an emergency response organization, users traditionally serve specific positions (for example: director, logistics chief, safety officer). In WebEOC, organizations can create an unlimited number of positions for users to fill. Multiple users can hold a single position in WebEOC, and a user can be assigned to multiple positions.

When an agency implements the positions feature, the user's account is set up with the user's proper name. The user's account is assigned to a position or positions, which defines the user's role in the response organization. If a user can be assigned to multiple positions, the user will be prompted to select the specific position during login that he or she is fulfilling.

Positions and position access codes (PACs) allow new users to self-register and create user accounts for themselves the first time they access WebEOC. This reduces the administrator's burden of creating and managing user accounts on an ongoing basis.

See the *System* topic for detailed instructions on self-registration and security features located in the General manager.

Every position must be assigned to a group. A position's group assignments determine the boards, links, menus, and plug-ins that will appear on the users' control panel. Positions assigned to multiple groups will have the most permissive permissions from each.

Position Access Codes

What Is a PAC?

A PAC serves as a layer of password protection for a position, separate from the user's self-selected password on a user account. A user creates a password for his account, but the WebEOC administrator generates the PAC as a way of controlling who can register for a position.

Why have PACs?

PACs serve three purposes.

1. Implementing PACs reduces the burden on administrators during an emergency. After users are given their position name, PAC, and the URL to their WebEOC, they are able to register themselves, instead of the administrator having to do so. Administrators are then able to focus on more substantive issues during the emergency, instead of spending valuable time administering

users. Administrators should define positions and have users register their accounts before an emergency.

2. PACs prevent users from registering for unauthorized positions. Before users can self-register for a position in WebEOC, they must have the PAC for that specific position. Without the PAC, a user will not be able to self-register and log in to that position.

3. PACs add individual accountability. When a user logs in to WebEOC, he logs in to a specific position. This allows administrators, through the Position Log, to track the actions of multiple users that have filled one position during an emergency. Administrators are able to track individuals and positions independently.

PACs and User Self-registration

PACs are only used when the WebEOC administrator enables the Allow Self-registration feature in the General manager (located in the System section).

For detailed instructions on enabling the self-registration feature, see “The General Manager” section in the System topic.

Creating and Managing PACs

PACs are randomly generated by WebEOC. The following are examples of PACs.

- Wx9%z{B7
- 2d+WK4i%
- L&c34eD{

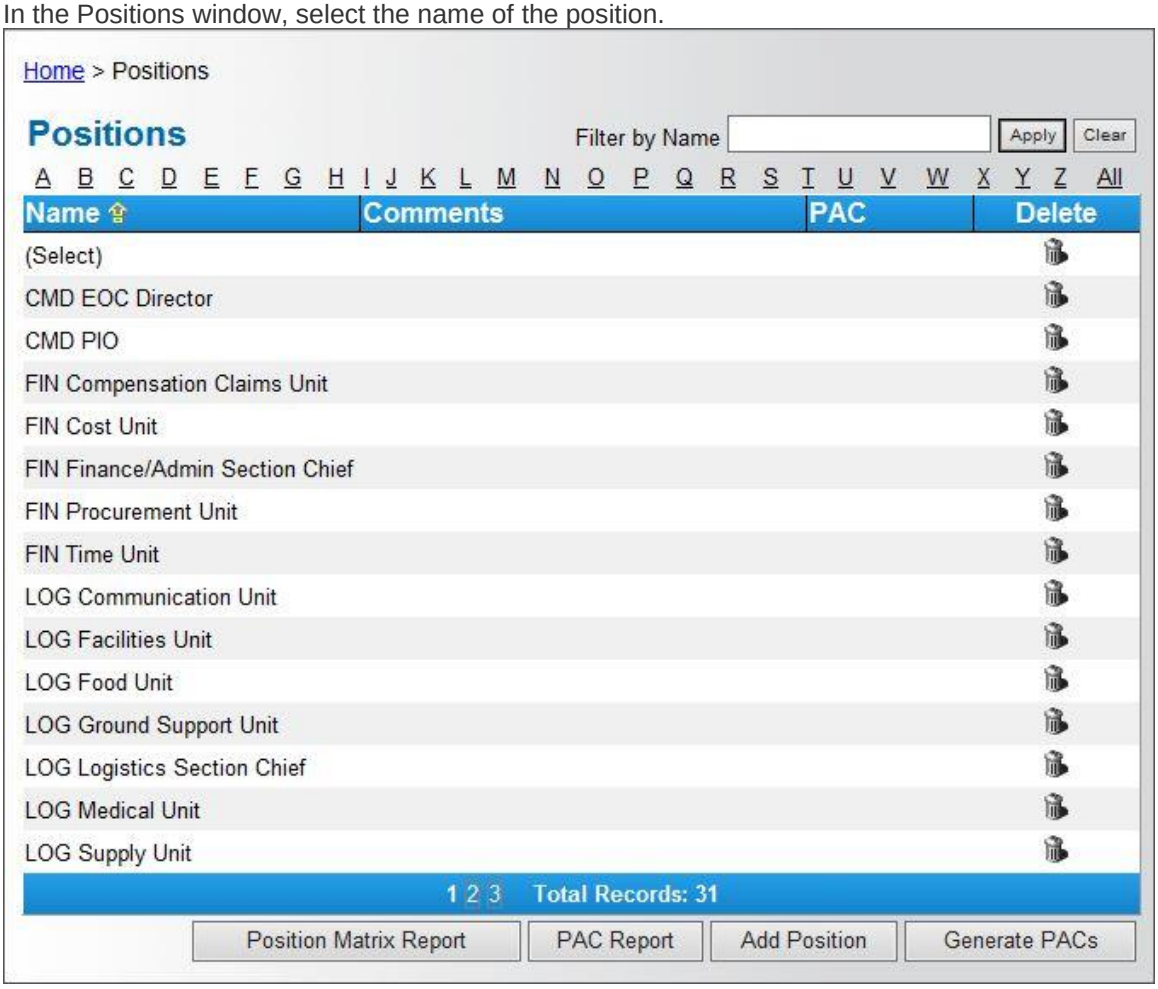
PACs can be created on a position-by-position basis or for all positions simultaneously.

Generating a PAC for a Single Position

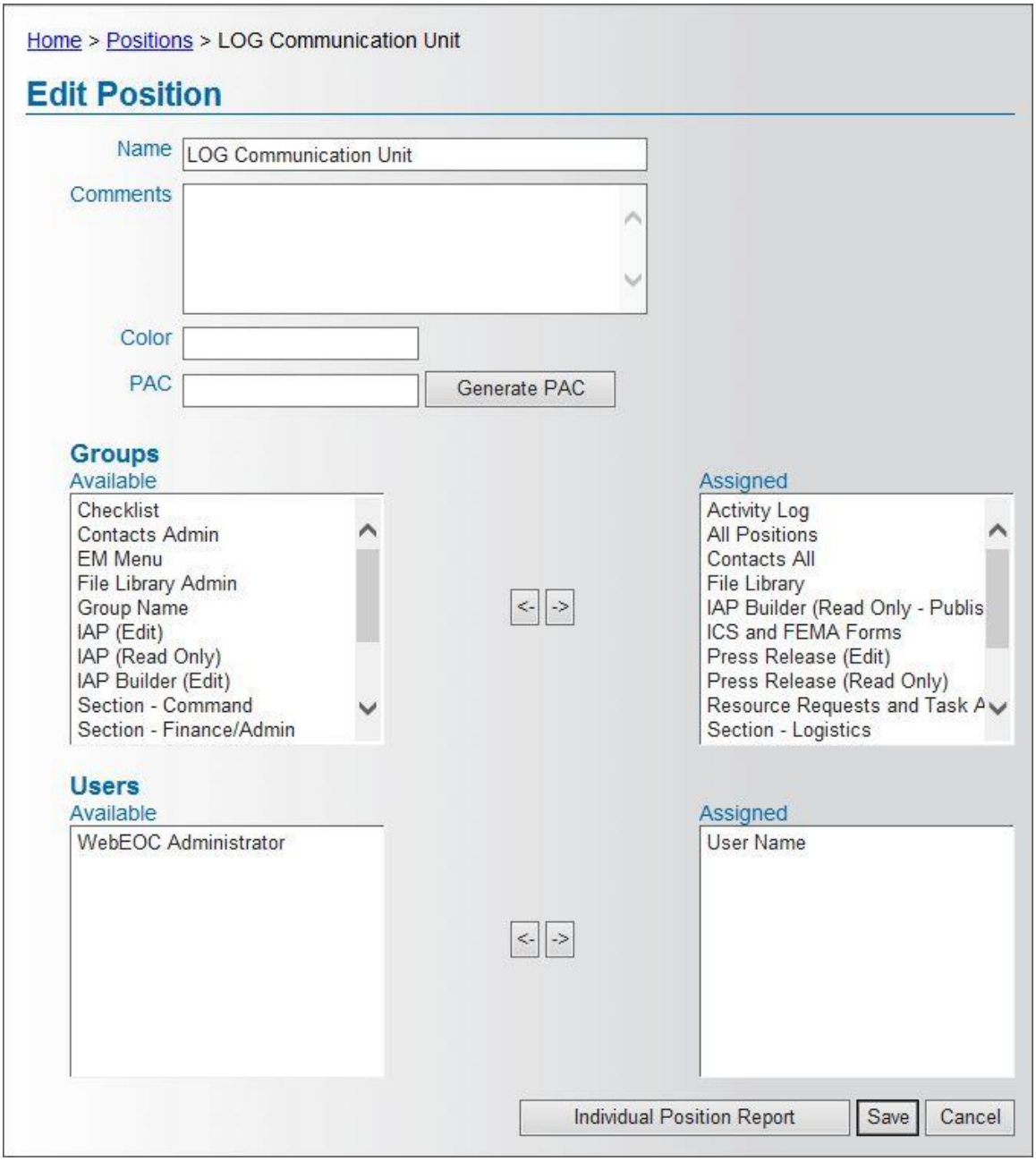
To create a PAC for a specific position, follow the steps below.

1. Select the Positions link in the Users section of the Admin window.

2. In the Positions window, select the name of the position.



3. Select the Generate PAC button.



4. The PAC will appear in the PAC field. Select the Save button to save this PAC for this position, or select the Cancel button to abort the operation.

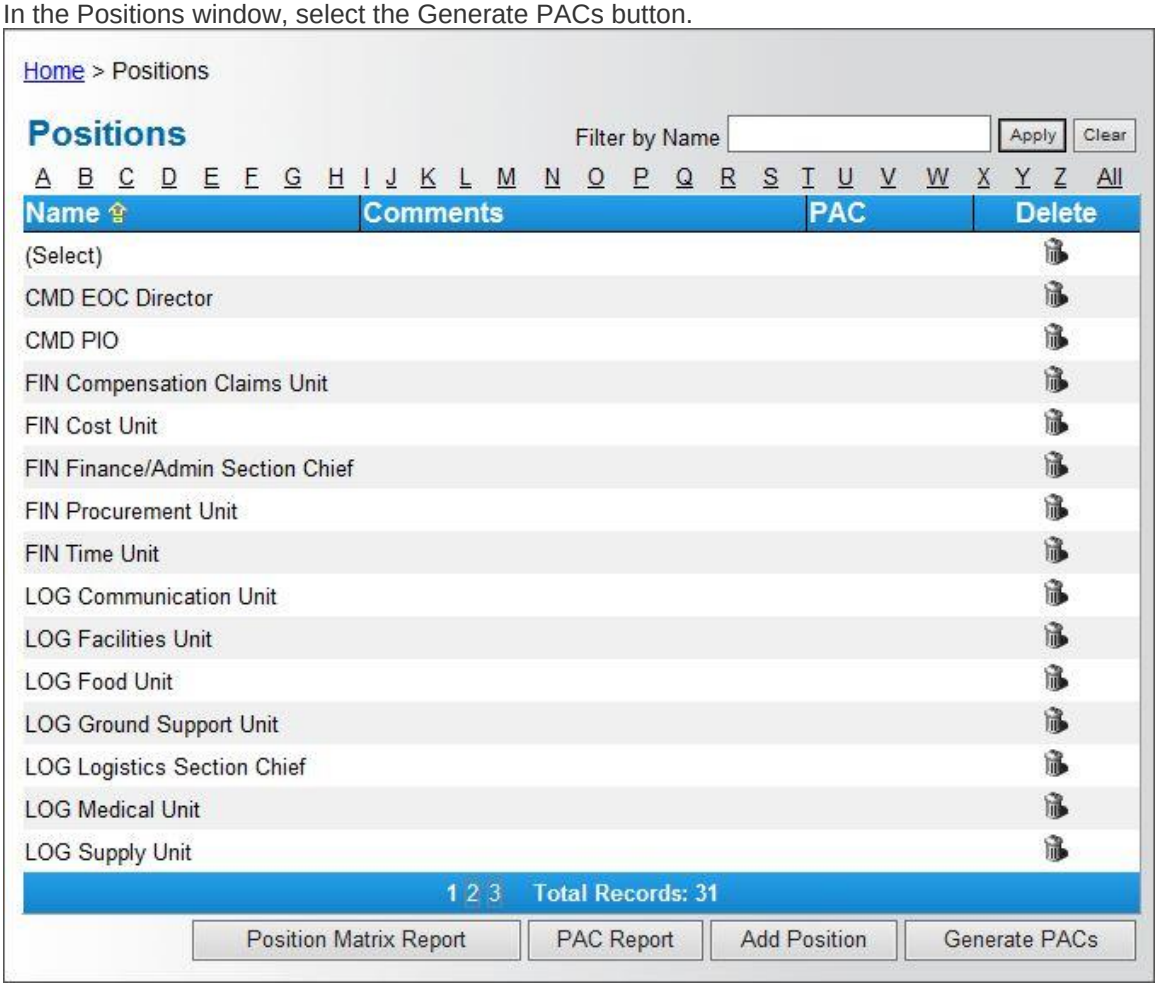
Generating PACs for All Positions Simultaneously

When generating PACs for all positions simultaneously, existing PACs will also be updated.

To generate PACs for all existing positions simultaneously, follow the steps below.

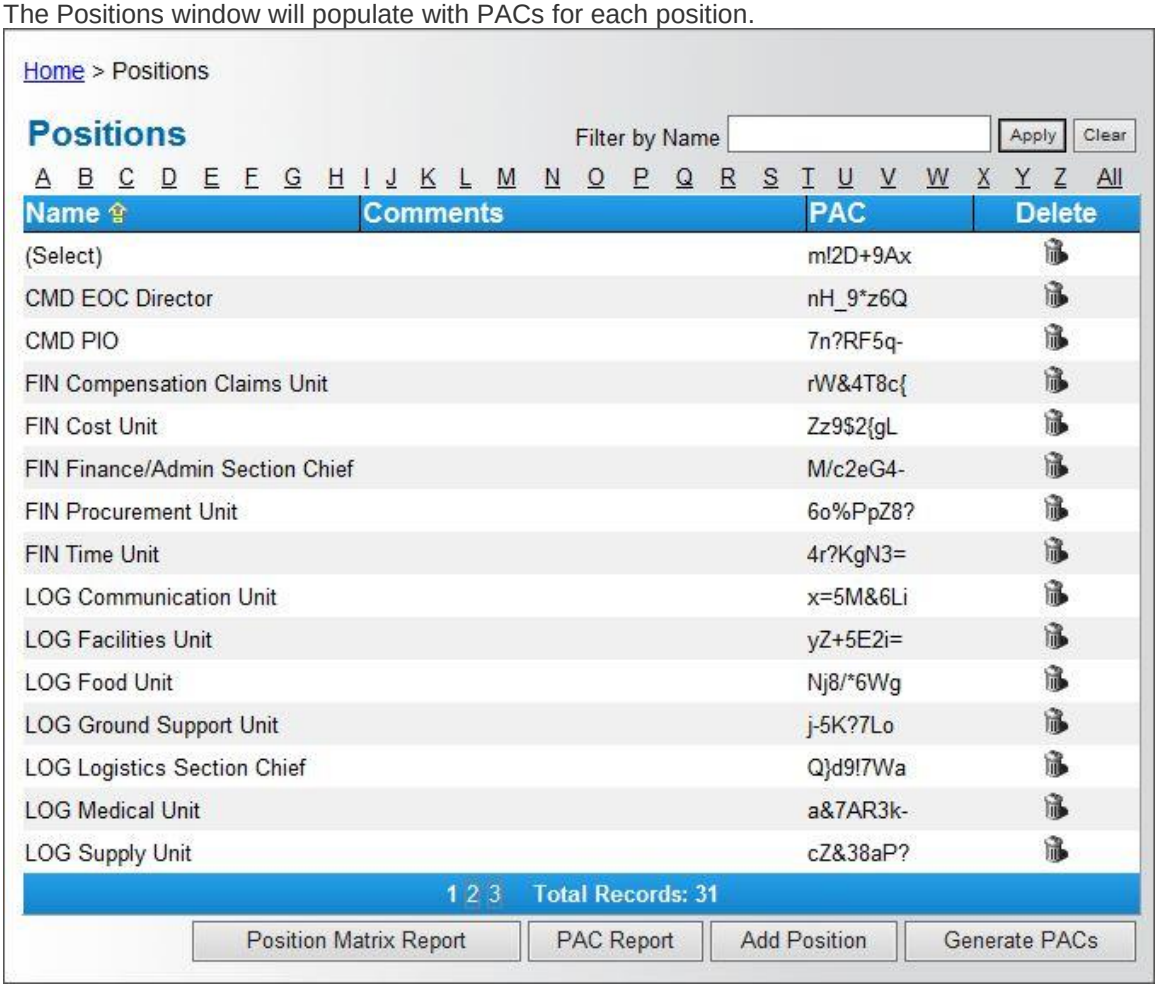
1. Select the Positions link in the Users section of the Admin window.

2. In the Positions window, select the Generate PACs button.



3. When the confirmation window appears, select the **OK** button to continue, or select the **Cancel** button to abort the operation.

4. The Positions window will populate with PACs for each position.

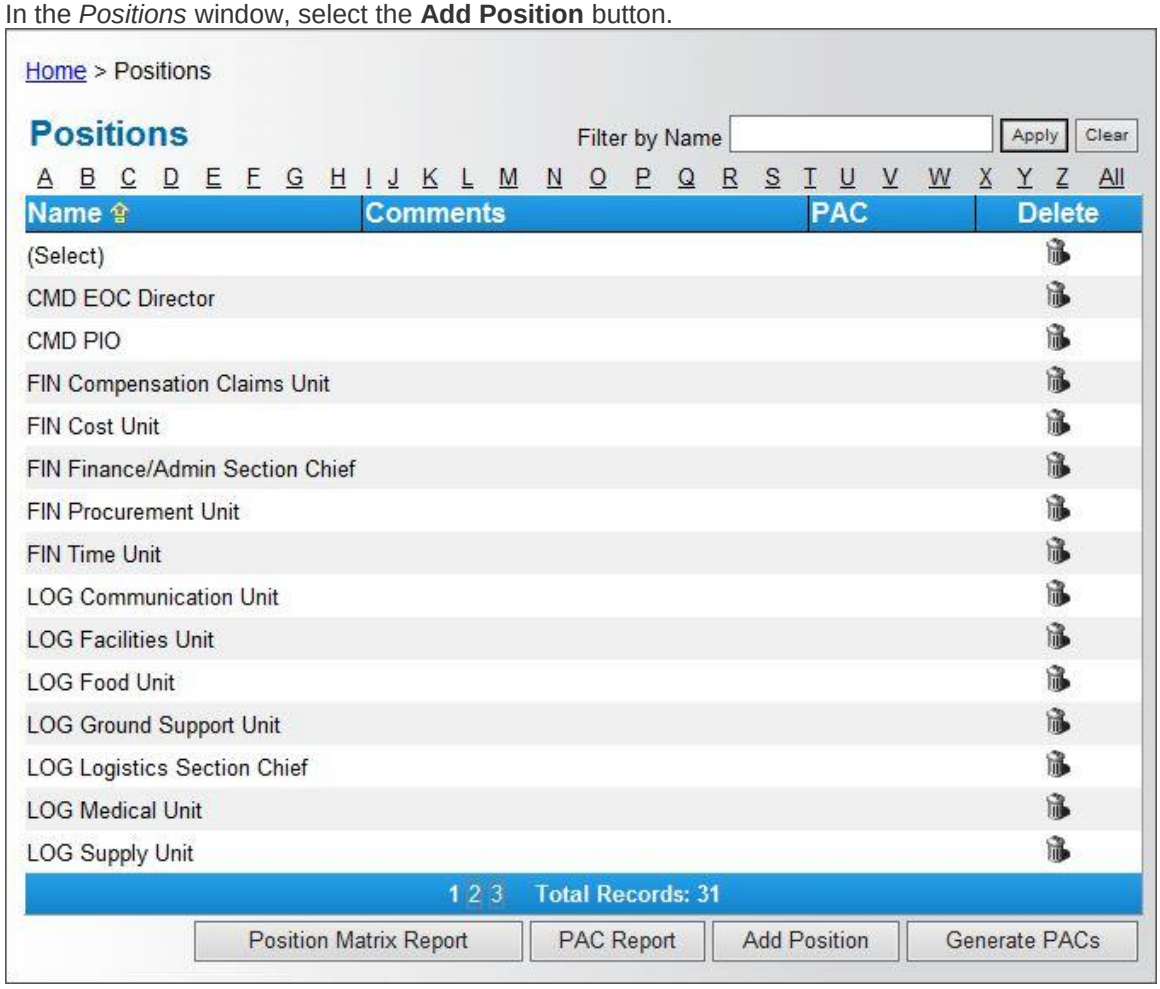


Adding a New Position

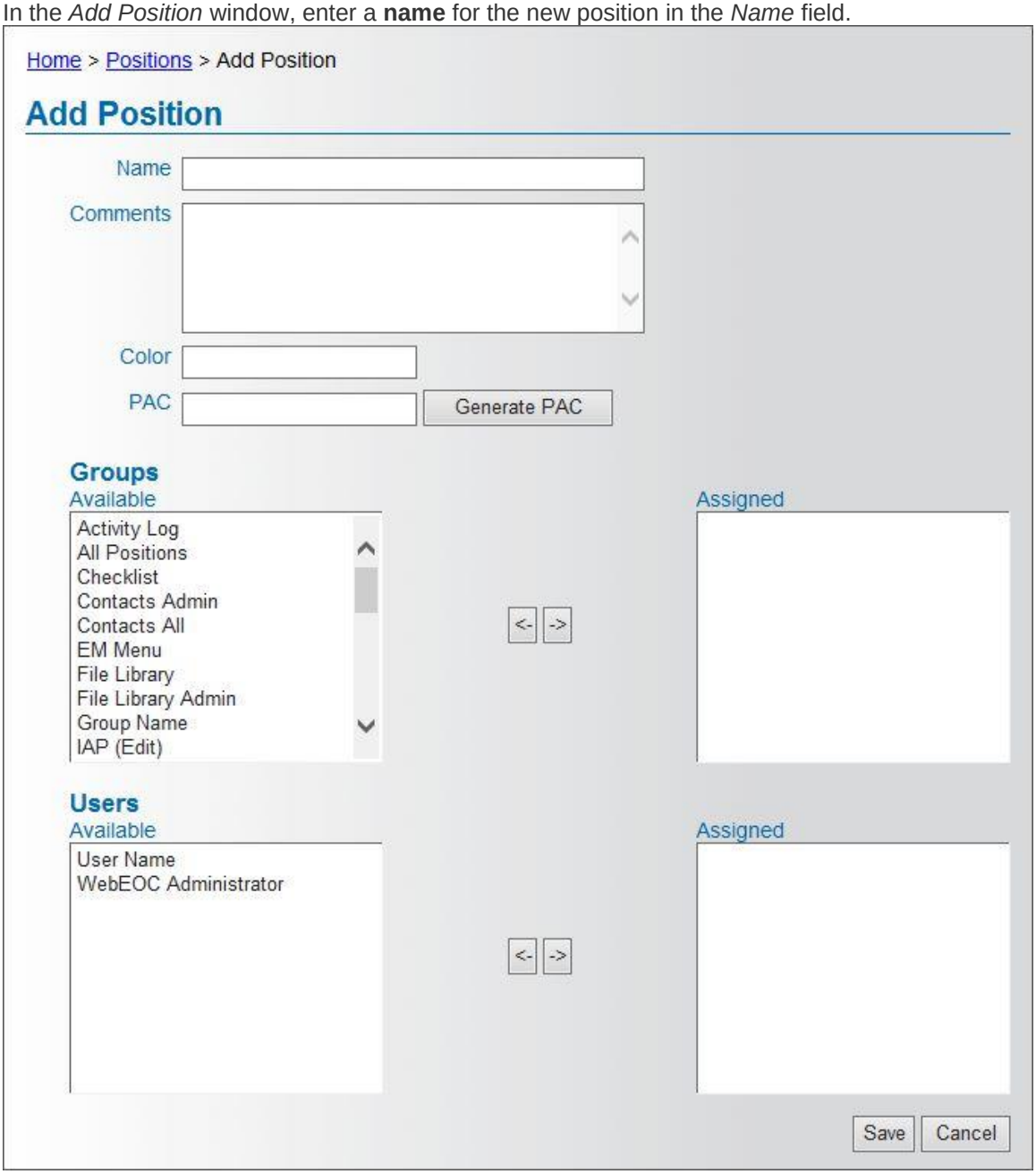
To add a new position, follow the steps below.

1. Select the **Positions** link in the *Users* section of the admin window.

2. In the *Positions* window, select the **Add Position** button.



3. In the *Add Position* window, enter a **name** for the new position in the *Name* field.



4. In the *Comments* field, add additional information about this position.

5. To assign a background color to the position name, click inside the **Color field**, and when the color palette appears, use the **crosshair icon** to select the color. This color will be applied wherever the position field is displayed on a board. You can also enter a color code in the field.

6. To generate a position access code (PAC) for this position, select the **Generate PAC** button.

Note: For additional information on PACs, see the "Position Access Codes" section in this topic.

7. When the confirmation dialog box appears, select the **OK** button to continue, or select the **Cancel** button to abort the operation.

8. To assign the position to a group or groups, select the **group** from the *Available* list, and select the **right arrow** to move the group to the *Assigned* list. To unassign a group from the *Assigned* list, select the **group** in the *Assigned* list, and select the **left arrow** to move the group to the *Available* list.

Note: A position's group assignments control the access level and permissions the position will have to boards, menus, plugins, etc., from their WebEOC control panel.

9. To assign a user or users to the position, select the user's **name** from the *Available* list, and select the **right arrow** to move the user to the *Assigned* list. To remove a group from the *Assigned* list, select the **group** in the *Assigned* list, and select the **left arrow**.

10. Select the **Save** button to save the information, or select the **Cancel** button to abort the operation.

Note: Changes made to user assignments in the Positions manager will automatically be applied to parameters set in the Users manager.

Editing an Existing Position

To edit an existing position, follow the steps below.

1. Select the **Positions** link in the *Users* section of the admin window.

2. In the *Positions* window, select the **position** you want to edit.

3. In the *Edit Position* window, make your changes.

Note: For additional information on fields located in the Edit Position screen, see the "Creating a New Position" section in this topic.

4. Select the **Save** button to save the information, or select the **Cancel** button to abort the operation.

Note: Changes made to user assignments in the Positions manager will automatically be applied to the Users manager.

Deleting a Position

Before deleting a position, make sure all users currently assigned to the position have been reassigned to another position; otherwise, they may not have access to WebEOC components from their control panel.

To delete a position, follow the steps below.

1. Select the **Positions** link in the *Users* section of the admin window.

2. In the *Positions* window, select the **trash can icon** next to the name of the position you want to delete.

3. Select the **OK** button to delete the position, or select the **Cancel** button to abort the operation.

Note: Changes made to user assignments in the Positions manager will automatically be applied to the Users manager.

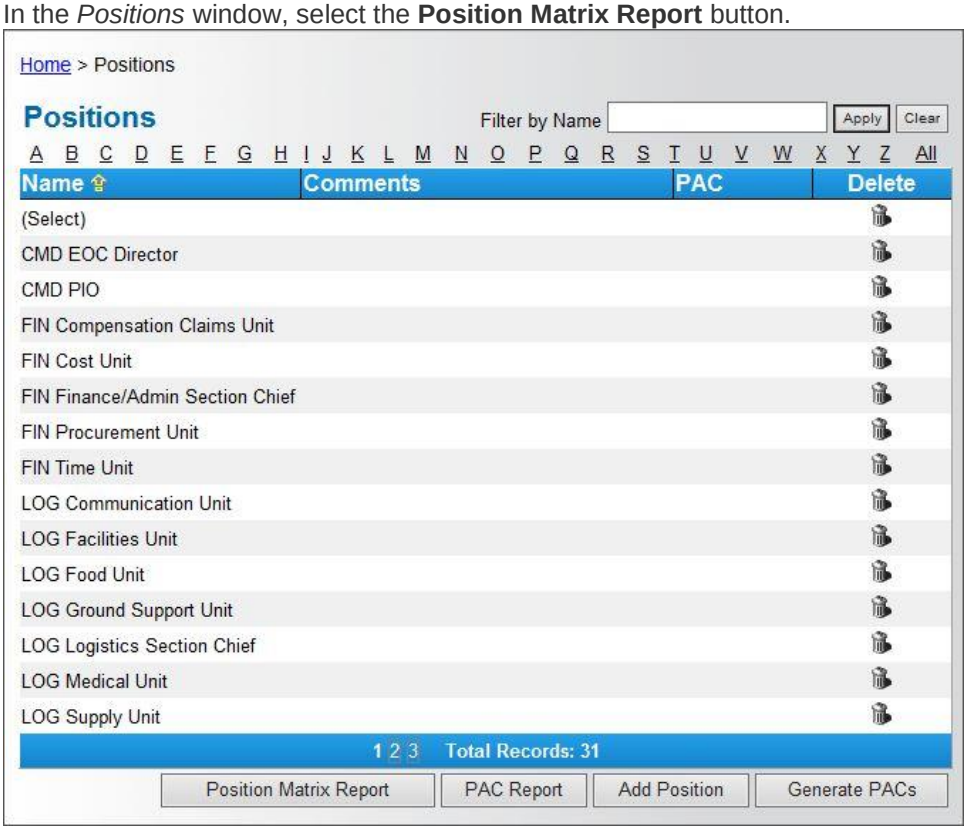
Viewing the Position Matrix Report

The Position Matrix Report lists the positions in your organization; the boards those positions have access to; the level of access to each board; and the position's access to Menus, Links, Plugins, Incidents, File Library folders, chat rooms, Checklists, MapTac maps, and process permissions. Only users with access to the Positions manager can access this report.

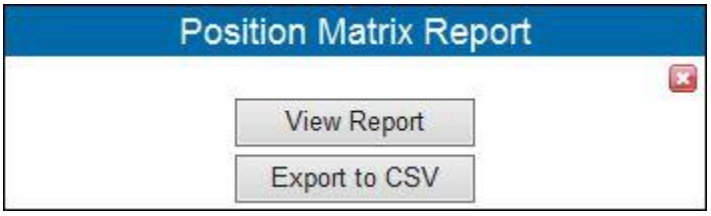
To view the Position Matrix Report, follow the steps below.

1. Select the **Positions** link in the *Users* section of the admin window.

2. In the *Positions* window, select the **Position Matrix Report** button.



3. In the *Position Matrix Report* window, select the **View Report** button to open the Position Matrix Report in a new window or select the **Export to CSV** button to export the Position Matrix Report in a CSV file. Opening the Position Matrix Report in a new window will allow you to print it as a PDF.



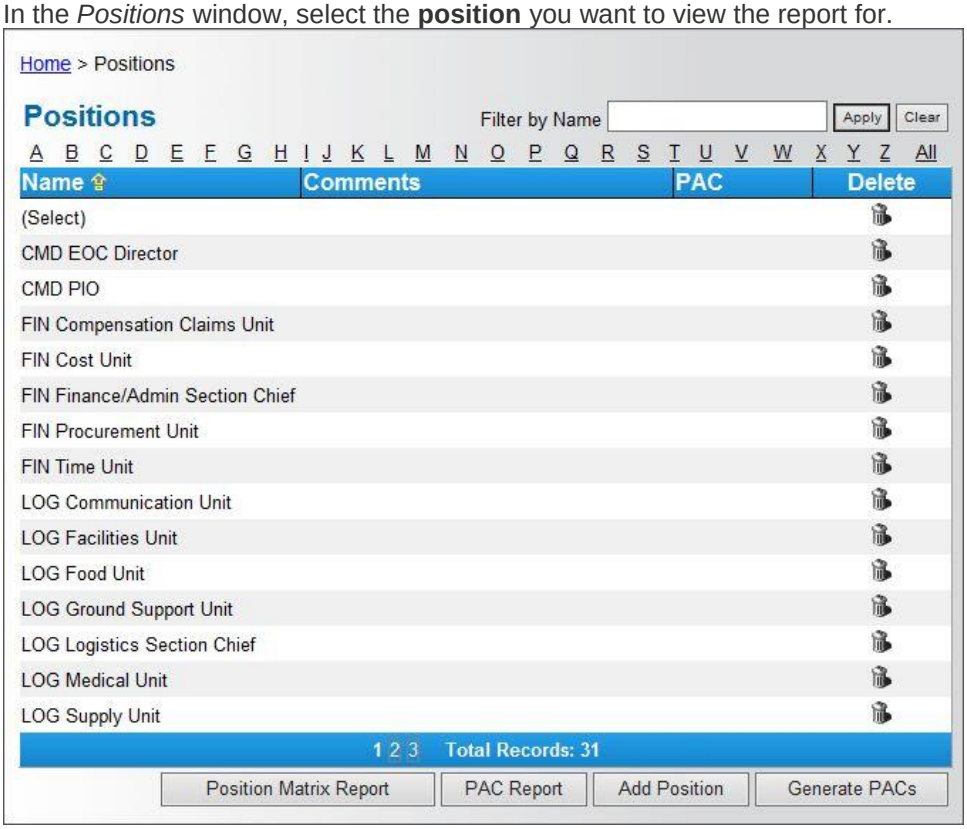
Viewing the Position Report

The Position Report lists the boards; the level of access to each board; and the access to Menus, Links, Plugins, Incidents, File Library folders, chat rooms, Checklists, MapTac maps, and process permissions for a selected position. Only users with access to the *Positions* manager can access this report.

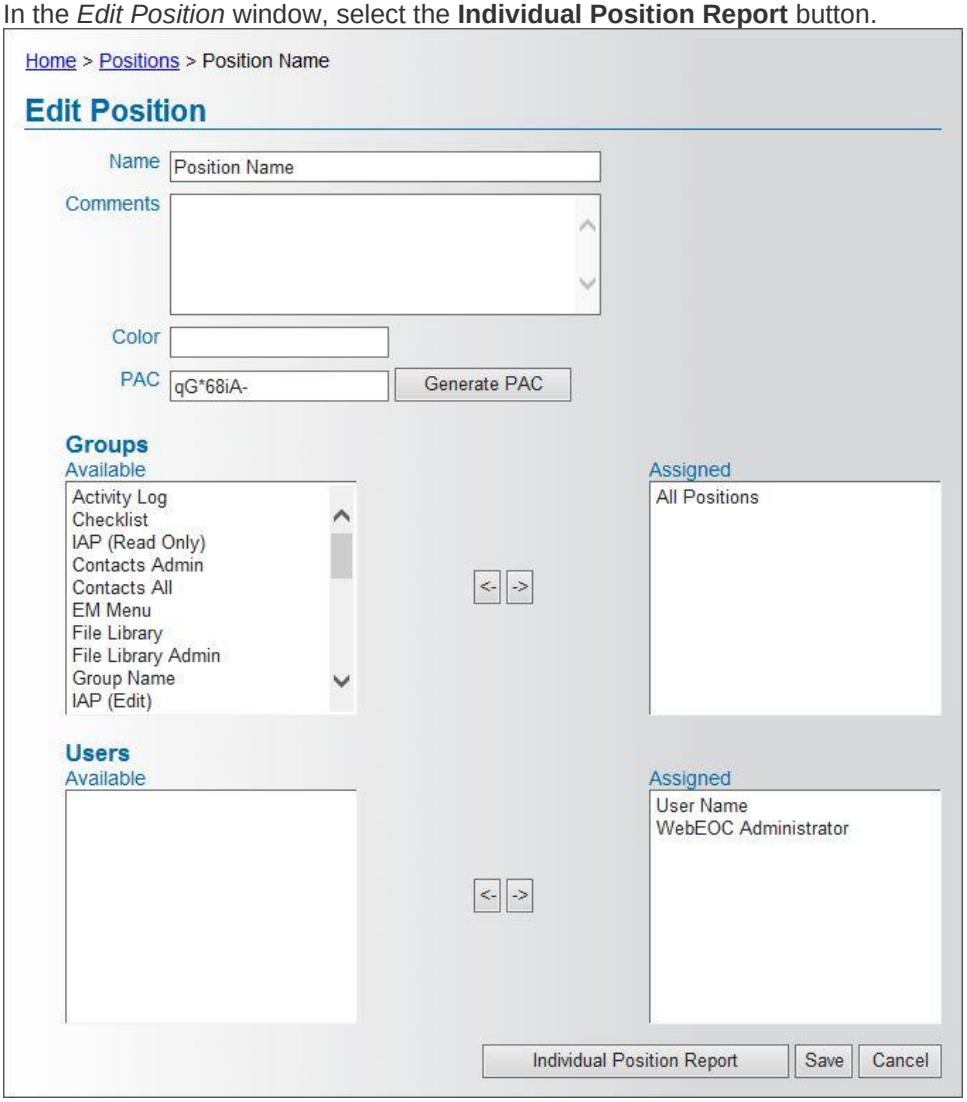
To view the Position Report, follow the steps below.

1. Select the **Positions** link in the *Users* section of the admin window.

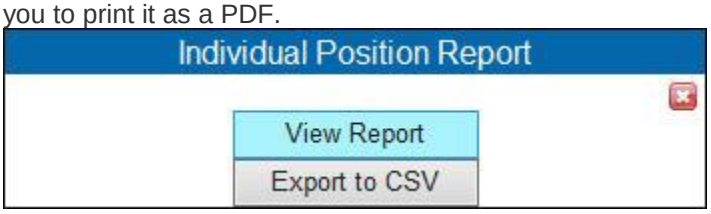
2. In the *Positions* window, select the **position** you want to view the report for.



3. In the *Edit Position* window, select the **Individual Position Report** button.



4. In the *Individual Position Report* window, select the **View Report** button to open the Individual Position Report in a new window or select the **Export to CSV** button to export the Individual Position Report in a CSV file. Opening the Individual Position Report in a new window will allow you to print it as a PDF.



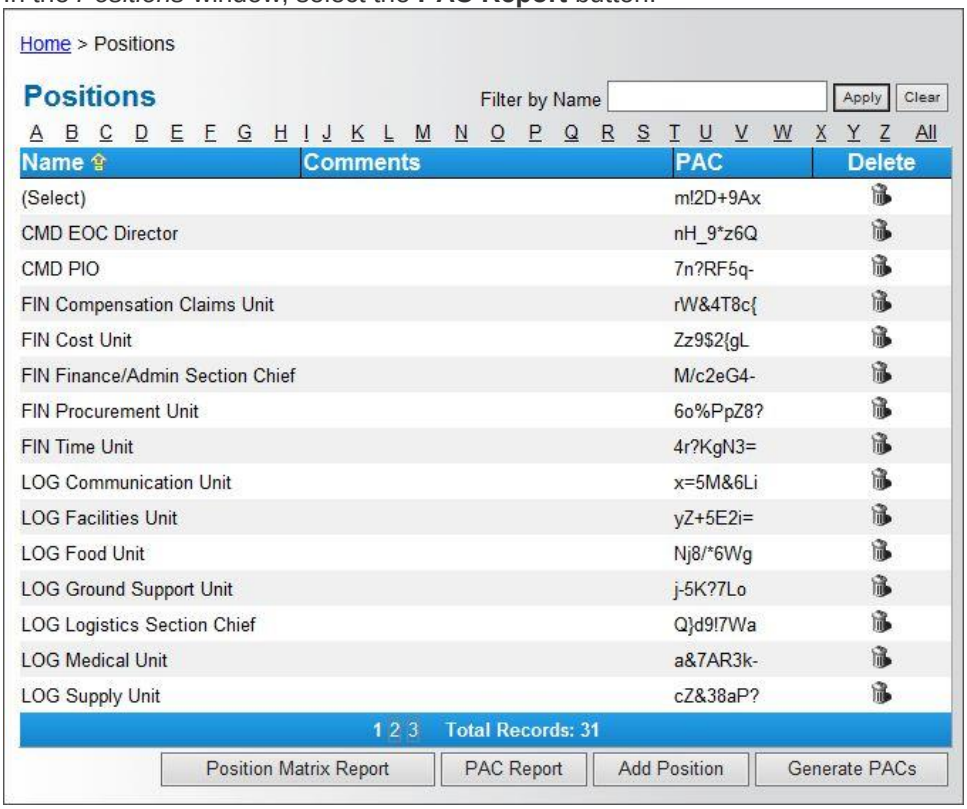
Viewing the PAC Report

The PAC Report provides a quick list of positions and their associated PACs. You can save the PDF to your desktop, email it within your agency, import this list into Microsoft® Excel®, or upload the PDF to the File Library. Only users with access to the *Positions* manager can access this report.

To view the PAC Report, follow the steps below.

1. Select the **Positions** link in the *Users* section of the admin window.

2. In the *Positions* window, select the **PAC Report** button.



3. In the *PAC Report* window, select the **View Report** button to open the PAC Report in a new window or select the **Export to CSV** button to export the PAC Report in a CSV file. Opening the PAC Report in a new window will allow you to print it as a PDF.

The Sessions Manager

Sessions are the period in which a user is logged on to WebEOC. Users authorized to access the Sessions manager can see which users are currently logged in to WebEOC and either terminate individual or group login sessions.

The Session List identifies the user account, position, the incident the user is currently logged in to, the user's name (if applicable), and the date and time the user account logged in to the system.

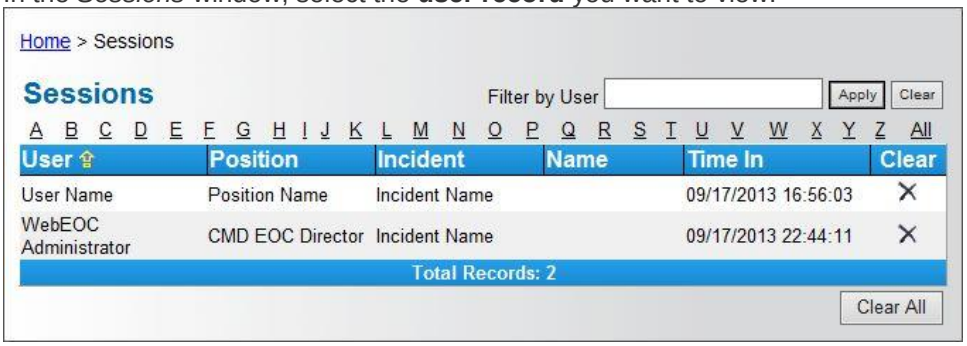
- User logins are added to and removed from the Session List window as they log in and out of the system.
- Additional detailed information for the user may be available if the *Require additional login information?* check box is selected in the General manager.

Users who are involuntarily logged out through the Sessions manager receive an advisory on their WebEOC control panel and must log back in to continue using WebEOC.

Viewing Session Information

To view session information, follow the steps below.

1. Select the **Sessions** link in the *Users* section of the admin window.
2. In the *Sessions* window, select the **user record** you want to view.



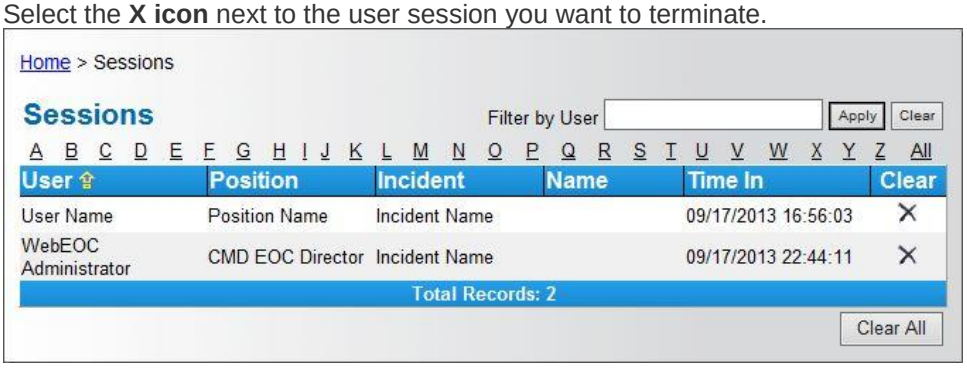
3. In the *Session Information* window, select the **Back button** to return to the *Sessions* window.

Terminating a Login Session

To terminate a user's log in session, follow the steps below.

1. Select the **Sessions** link in the *Users* section of the admin window.

2. Select the **X icon** next to the user session you want to terminate.



3. When the confirmation dialog box appears, select the **OK** button to terminate the user's session, or select the **Cancel** button to abort the operation. Users who have been forcibly logged off will receive a message at the bottom of their control panel. These users must log back in to continue using WebEOC.

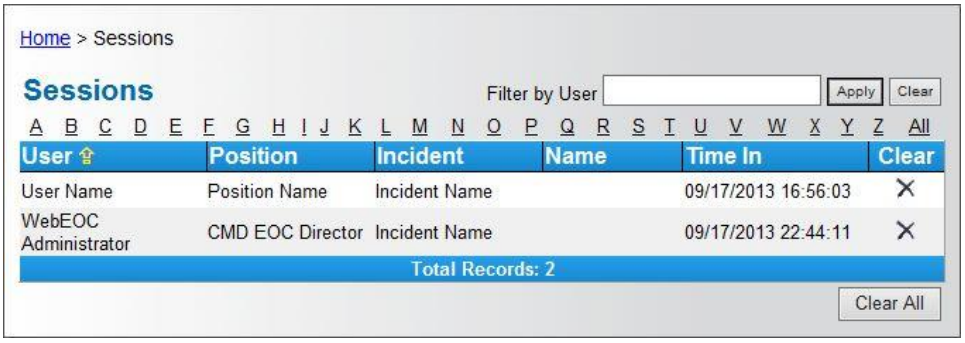
Terminating All Login Sessions Simultaneously

Warning: Terminating ALL user login sessions will end every user's WebEOC session. This process should only be used in extreme cases.

To terminate all user login sessions simultaneously, follow the steps below.

1. Select the **Sessions** link in the *Users* section of the admin window.

2. Select the **Clear All** button at the bottom of the *Sessions* window.



3. When the confirmation dialog box appears, select the **OK** button to terminate all sessions, or select the **Cancel** button to abort the operation.

Note: When terminating all login sessions, the Sessions window will be purged with the exception of the session performing the operation. Users who have been forcibly logged off will receive a message at the bottom of their control panel. These users must log back in to continue using WebEOC.

The Users Manager

The Users manager allows WebEOC administrators to create and edit basic user settings (user names, passwords, permissions, email addresses, etc.) for user accounts. You can also build user reports in the Users manager. The User Activity Report lists users; their last attempted login date and time; and their last successful login date and time.

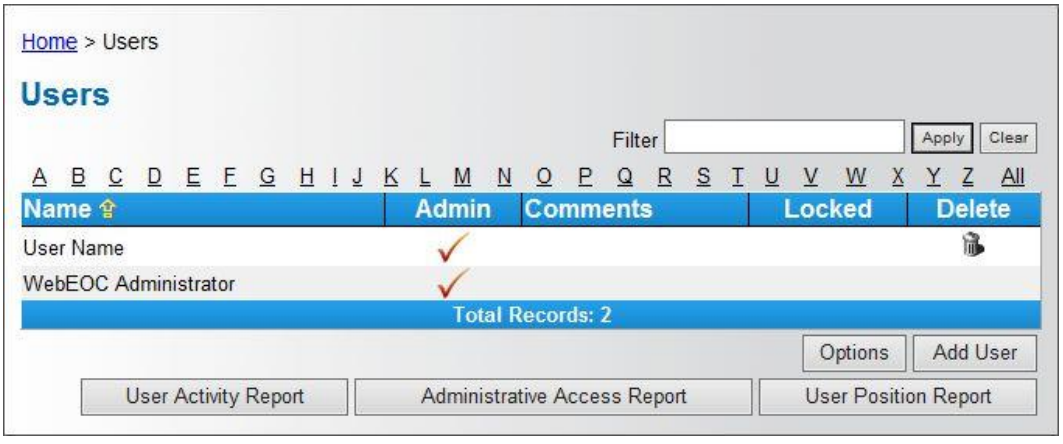
Each user account must be assigned to a position; each position must be assigned to a group; and each group must be assigned to an incident. Without a position, a user cannot log in to WebEOC. Without a group, a user does not have permission to any incidents, and without being assigned to an incident, a user does not have permission to any boards, plug-ins, etc.

Position assignments made in the Users manager are automatically applied to the Positions manager. Changes made in the Positions manager are automatically applied to the Users manager. The Administrative Access Report shows you which users have full or partial administrative access and which admin managers they have access to.

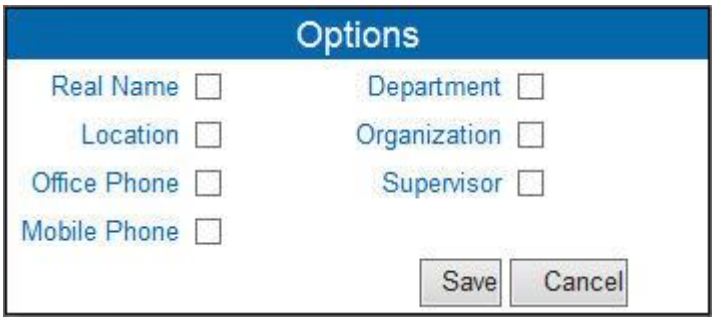
If you (the WebEOC administrator) provide a position name, position access code (PAC), and your agency's WebEOC URL, users can set up their own accounts. If users will be setting up their own accounts, provide them with the instructions in this section. Users cannot grant themselves WebEOC administrator permissions. User accounts configured as administrators must be created by a WebEOC administrator. Granting users WebEOC administrator privileges through the Users manager automatically enables them to perform all administrative functions in WebEOC.

Sorting the Users List

The *Options* button in the *Users* window allows you to choose which columns of additional information fields are displayed in the *Users* list.



Select the **Options** button to choose the columns of data to display.



Planning a New User Account

Before creating a user account, you should determine the user's information and permission requirements. Answer the following questions before creating a user account.

- What will be an appropriate user name and password for the user account?
- What position or positions will the user be assigned to? Does the position already exist?
- Will the user be a WebEOC administrator?
- Will the user need to be able to send emails?
- Will multiple users be assigned to the account?

Single-user or Multi-user Accounts

Login accounts can be configured as either single- or multi-user. Multi-user accounts allow more than one user to log in using the same user account at any one time. Single-user accounts allow only one person to be logged in to a particular account. If a user logs in to an active single-user account, the active user is logged out.

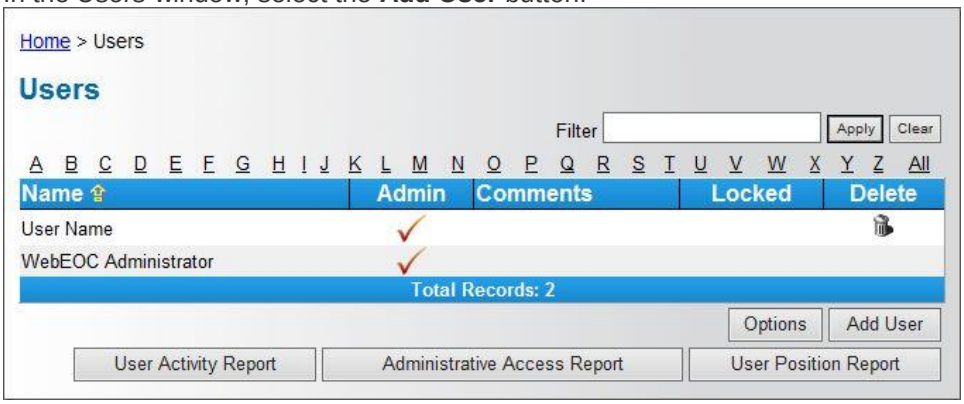
If your account is configured as single-user and someone else is logged into that account, when you select the OK button, the other user who is involuntarily logged off receives a pop-up message on his or her control panel. When involuntarily logged off, the logged-off user should exit the system (by selecting the Log Off button) and contact the WebEOC administrator for assistance.

Adding a User Account

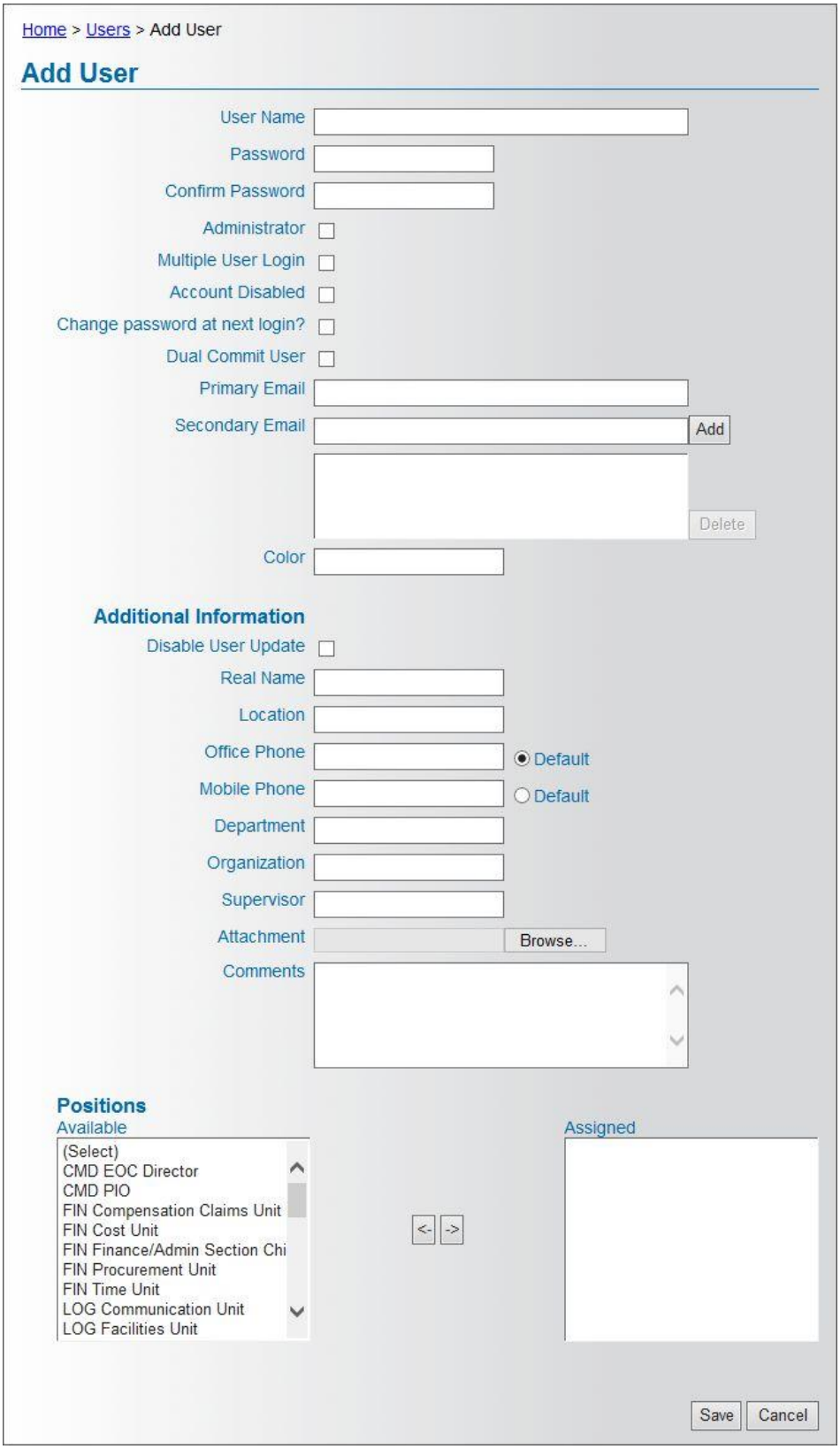
To add a new user account, follow the steps below.

1. In the admin manager window, select the **Users** link in the **Users** section.

2. In the *Users* window, select the **Add User** button.



3. In the *Add User* window, enter the **user name** the user will use to log in to WebEOC in the *User Name* field.



4. Enter the **password** the user will use to log in to WebEOC in the *Password* field, and reenter the **password** in the *Confirm Password* field. If the passwords do not match, a red error message will appear next to the *Confirm Password* field. Passwords are case sensitive, are limited to 50 characters, and can contain any character (for example, alpha-numeric and/or special characters such as a space, #, &, $). The only exception to this rule is the single quotation mark symbol which, for security reasons, cannot be used in passwords.

5. Select the **Administrator** check box to allow the user unrestricted access in WebEOC. The *Administrator* check box will not be available for users who do not have WebEOC administrator privileges, even if they have access to the *Users* manager through an admin profile. Administrator permissions are permanently assigned to the WebEOC administrator system account and cannot be modified. WebEOC administrator privileges override any permissions set up in the *Admin Profiles* manager.

6. If multiple users will use this account simultaneously, select the **Multiple User Login** check box. If you do not select the *Multiple User Login* check box and multiple users use this account, the last user successfully logging in will cause the user currently logged in to be logged out of WebEOC. When this occurs, the user attempting login will be asked to confirm if they want to continue the login sequence and log off the other user. The user logged out of WebEOC will receive an error message on his control panel.

7. Select **Account Disabled** to disable an existing account.

8. If you want to force the user to change his password the next time he or she logs in, select the **Change password at next login?** check box.

Note: This feature is useful if an administrator has set an initial password for a user or has re-set a user's password.

9. If this user account will be used for Dual Commit purposes, select the **Dual Commit User** check box. You can select the **Multiple User Login** check box for Dual Commit user accounts. See the *Processes* topic for detailed instructions on the Dual Commit feature.

Note: When the Dual Commit User check box is selected, this user account will not appear in the Users drop-down list.

10. If the user will need to be able to send emails, enter an **email address** in the *Primary Email* field. See the *Systems* topic for detailed instructions on how to enable the email feature. As long as your SMTP server is configured in WebEOC, emails can be sent from within the WebEOC Messages plug-in or an email-enabled status board to any external email-enabled device. If an

email address is not set for a user, the email capability will not be available for that user in the Messages plug-in.

11. If the user has a secondary email address, enter the **email address** in the *Secondary Email* field, and select the **Add** button.

Note: An unlimited number of email addresses may be configured for a user. When an email is generated in WebEOC, the message is sent to the primary and any secondary email addresses that have been configured.

12. To assign a background color to a user name, click in the **Color** field, and when the color palette appears, use the **crosshair icon** to select the color. You can also enter a color code in the field.

Note: Background colors can be useful to distinguish between user names that are displayed on a status board.

13. In the *Additional Information* section, complete the fields as applicable. Fields in this section are optional. Information in this section will populate the *Additional Login Information* window. You can change the information that is displayed by default.

14. The *Disable User Update* check box will disable the update between the *Additional User Information* screen displayed during the logging in process and the data stored in the *Edit User* screen.

15. In the *Attachment* field, you can attach a file (for example, JPEG or PDF) to this user account.

16. Assign a position to the user account by selecting the **position** from the *Available* list, and selecting the **right arrow** to move the position to the *Assigned* list.

17. When you have completed the *Add User* window, select the **Save** button to save the user account, or select the **Cancel** button to abort the operation.

Editing an Existing User Account

The Users window can be filtered by selecting the letter of the alphabet that corresponds to the first letter in the user's first or last name.

To edit an existing user account, follow the steps below.

1. In the *Users* window, select the **name of the user account** you want to edit from the *Name* column.

2. Make your changes in the *Edit User* window.

3. To delete a secondary email address, select the **email address** you want to delete, and select the **Delete** button.

4. To remove an assigned position, select the **position** in the *Assigned* list, and select the **left arrow** to move the position to the *Available* list.

Note: If you make position changes in the Users manager, those changes will automatically be applied to the Positions manager.

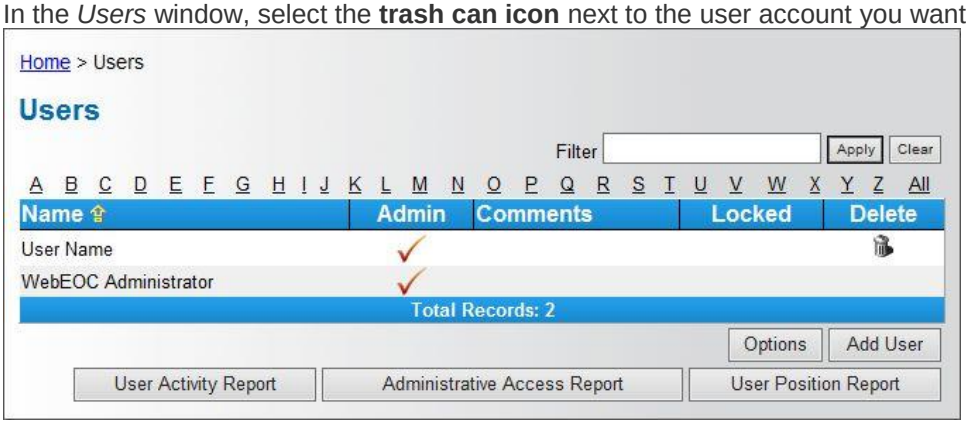
5. Select the **Save** button to save your changes, or select the **Cancel** button to abort the operation.

Deleting a User Account

The WebEOC administrator account cannot be deleted from the system. Deleting a user account will remove the user from the Groups and Positions managers.

To delete a user, follow the steps below.

1. In the *Users* window, select the **trash can icon** next to the user account you want to delete.



Note: The WebEOC Administrator account cannot be deleted.

2. When the delete confirmation window appears, select the **OK** button to permanently delete the user account, or select the **Cancel** button to abort the operation.

Locking a User Account

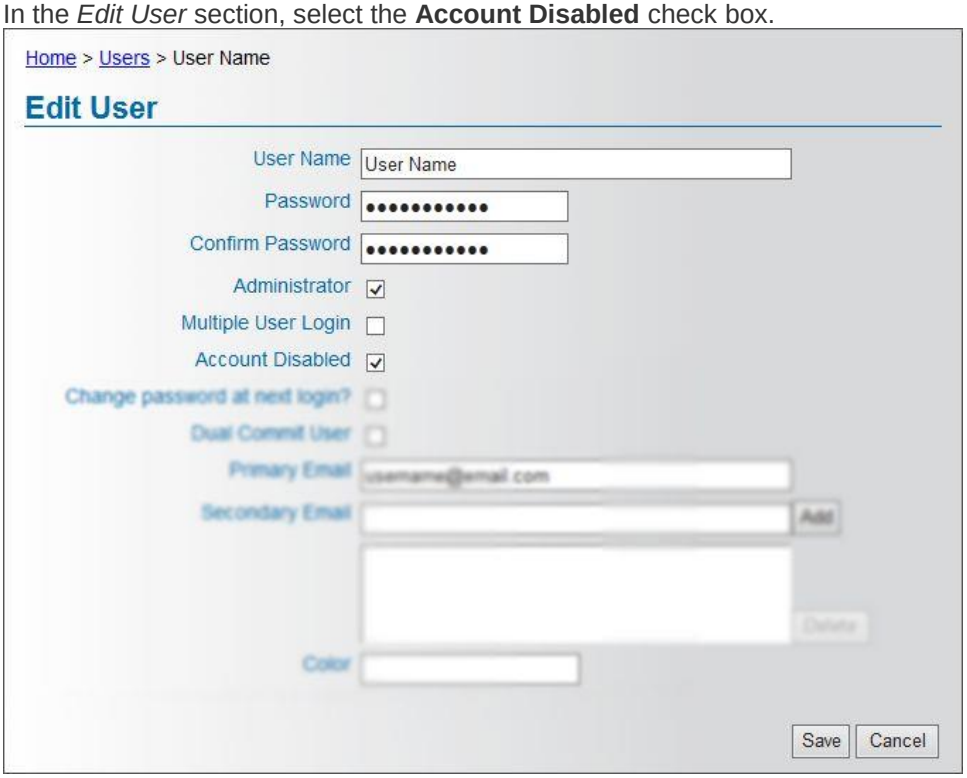
Only a WebEOC administrator or a user with appropriate admin profile permissions can lock or unlock a user account.

In *The General Manager* section in the *System* topic, the administrator can set a limit to the number of times a user can log in unsuccessfully. If a user exceeds the number of log in attempts allowed, his or her

user account will be automatically locked and a lock icon will appear next to his name in the *Users* window.

To manually lock a user account, follow the steps below.

1. In the *Users* window, select the **user account** you want to lock.
2. In the *Edit User* section, select the **Account Disabled** check box.



3. Select the **Save** button to save your changes, or select the **Cancel** button to abort the operation.

Unlocking a User Account

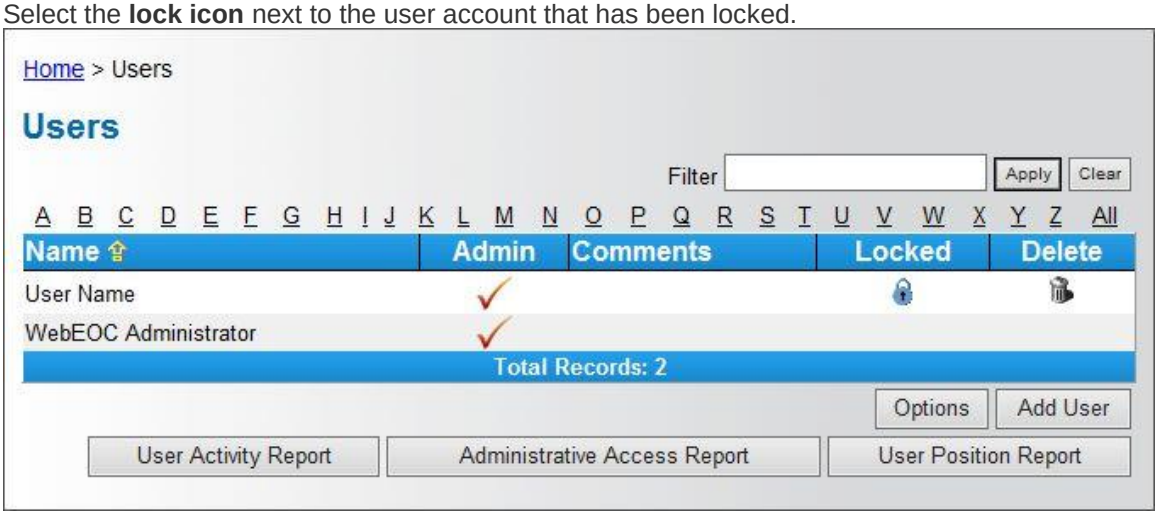
Only a WebEOC administrator or a user with appropriate admin profile permissions can lock or unlock a user account.

In *The General Manager* section in the *System* topic, the administrator can set a limit to the number of times a user can log in unsuccessfully. If a user exceeds the number of log in attempts allowed, his or her user account will be automatically locked and a lock icon will appear next to his name in the *Users* window.

To manually unlock a user account, follow the steps below.

1. Select the **Users** link in the *Users* section of the admin window.

2. Select the **lock icon** next to the user account that has been locked.



3. Select the **OK** button to unlock the user account, or select the **Cancel** button to abort the operation.

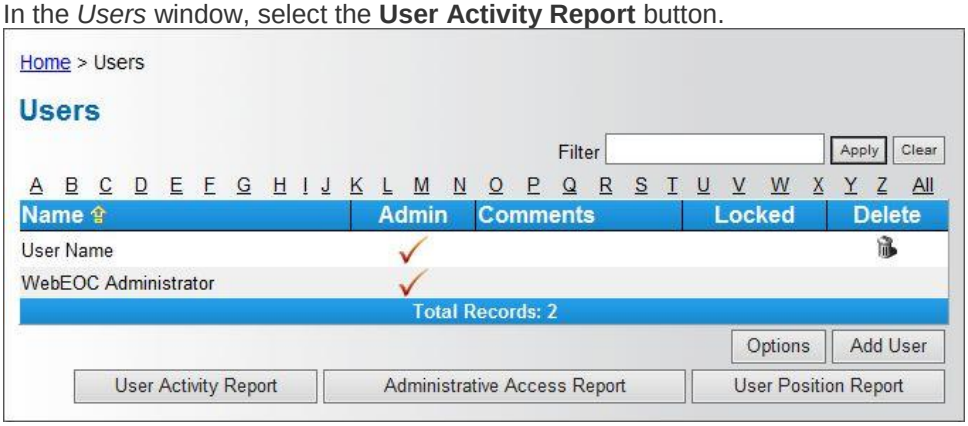
Viewing the User Activity Report

The User Activity Report lists users; their last attempted login date and time; and their last successful login date and time. This report assists you in managing user accounts.

To view the User Activity Report, follow the steps below.

1. Select the **Users** link in the *Users* section of the admin window.

2. In the *Users* window, select the **User Activity Report** button.



3. In the *User Activity Report* window, select the **View Report** button to open the User Activity Report in a new window or select the **Export to CSV** button to export the User Activity Report in a CSV file. Opening the User Activity Report in a new window will allow you to print it as a PDF.

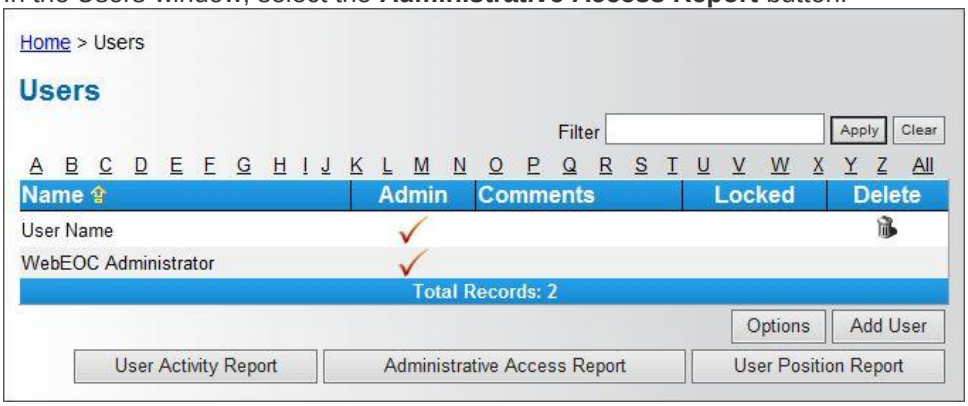
Viewing the Administrative Access Report

The Administrative Access Report shows you which users have full or partial administrative access and which admin managers they have access to. Only users with access to the Users manager can access this report.

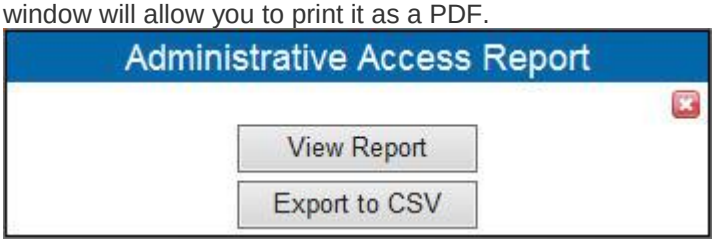
To view the Administrative Access Report, follow the steps below.

1. Select the **Users** link in the *Users* section of the admin window.

2. In the *Users* window, select the **Administrative Access Report** button.



3. In the *Administrative Access Report* window, select the **View Report** button to open the Administrative Access Report in a new window or select the **Export to CSV** button to export the Administrative Access Report in a CSV file. Opening the Administrative Access Report in a new window will allow you to print it as a PDF.



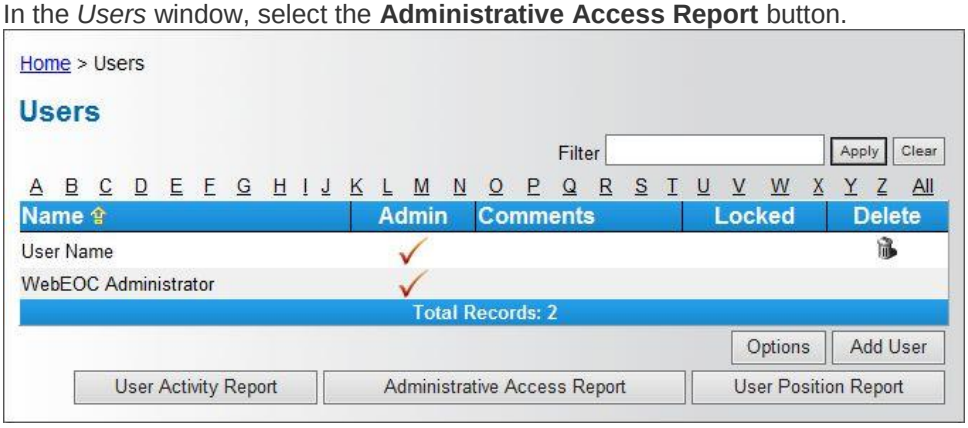
Viewing the User Position Report

The User Position Report lists every user and the positions they are assigned to.

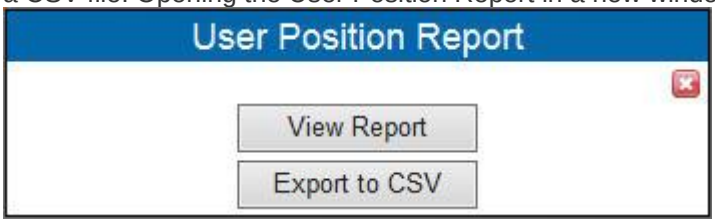
To view the User Activity Report, follow the steps below.

1. Select the **Users** link in the *Users* section of the admin window.

2. In the *Users* window, select the **Administrative Access Report** button.



3. In the *User Position Report* window, select the **View Report** button to open the User Position Report in a new window or select the **Export to CSV** button to export the User Position Report in a CSV file. Opening the User Position Report in a new window will allow you to print it as a PDF.



Incidents

The Archives Manager

The Archives manager allows you to store, query, and view archived incident data. Incidents are archived through the Incidents manager and are retrieved through the Archives manager. When archived data is retrieved, board and plug-in data are viewed in their original display format.

See “The Incidents Manager” section in this topic for detailed instructions on archiving an incident.

In the Archives manager, archived board data can be turned into a simulation through the Create Simulation feature. This feature provides the following capabilities.

- An archived incident can be replayed as though it were occurring in real-time, a valuable tool that can aid in post-incident critique and evaluation activities.
- Once simulated, an incident can be added to an organization’s suite of exercise scenarios, edited, and run using the Simulator manager for training and evaluation purposes.

When the archived incident is simulated, board data is automatically imported and added to the list of simulations in the Simulations manager.

Data for Chat, Contacts, MapTac, File Library, and NWS Alerts plug-ins are not saved when an incident is archived. You should consider generating hard copies as necessary to meet record retention requirements for this specific information.

Viewing an Archived Incident

Archived data can be viewed through two admin managers: Archives and Reporter. Both managers allow data to be presented in its original status board format, but viewing data through the Reporter manager requires you to create a custom report. The Reporter manager should be used if you need greater filtering capabilities than are present in Archives manager, you need to sort archived data, or you want the information presented in a report format. See “The Reporter Manager” section in this topic for detailed instructions.

If you want to view status board information in its original format, use the Archives manager.

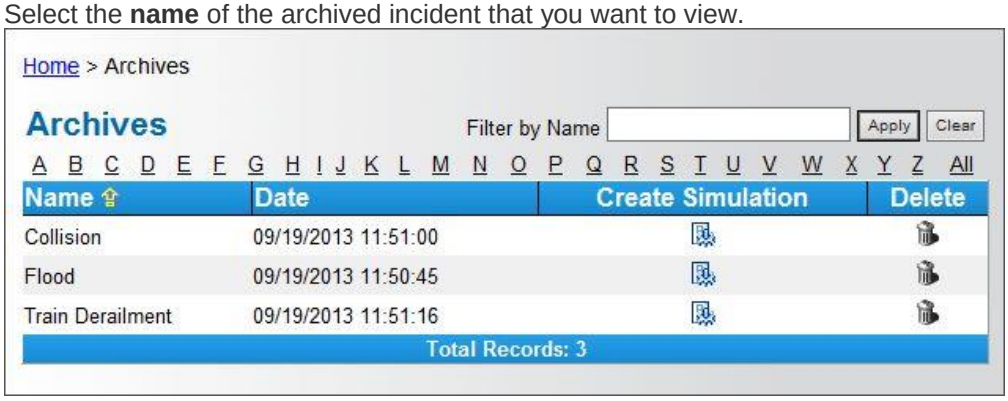
Note: The date displayed in the Archives window is the date that was configured when the incident was added to the Incidents manager.

Viewing Board Data for an Archived Incident

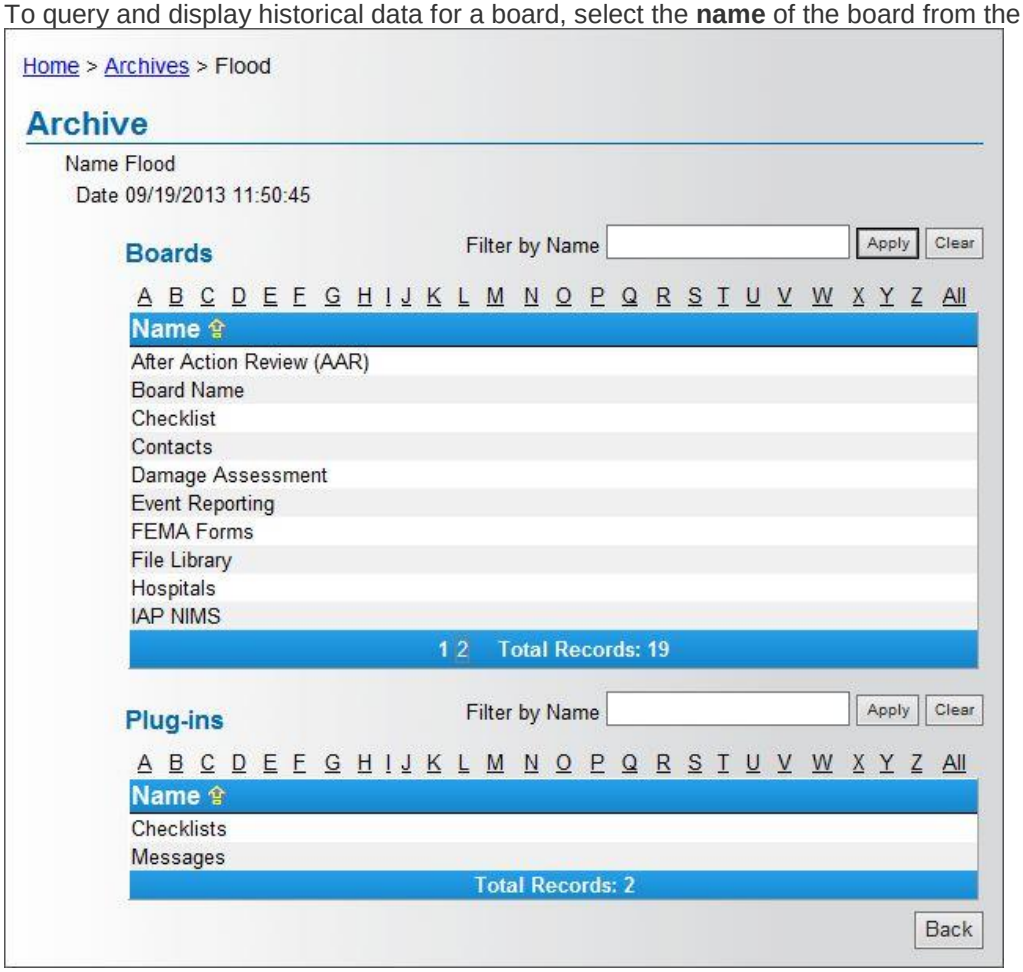
To view board data for an archived incident, follow the steps below.

1. Select the **Archives** link in the *Incidents* section of the admin window.

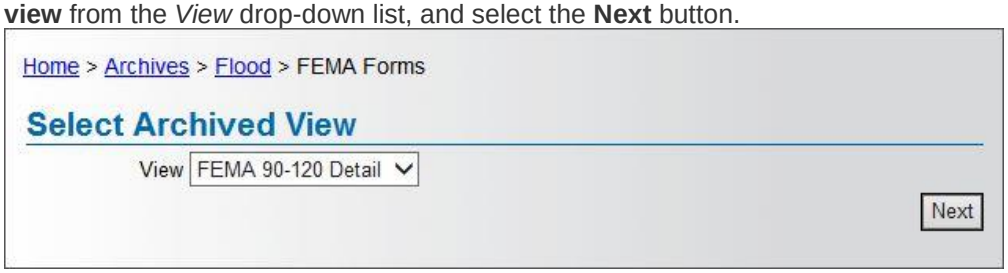
2. Select the **name** of the archived incident that you want to view.



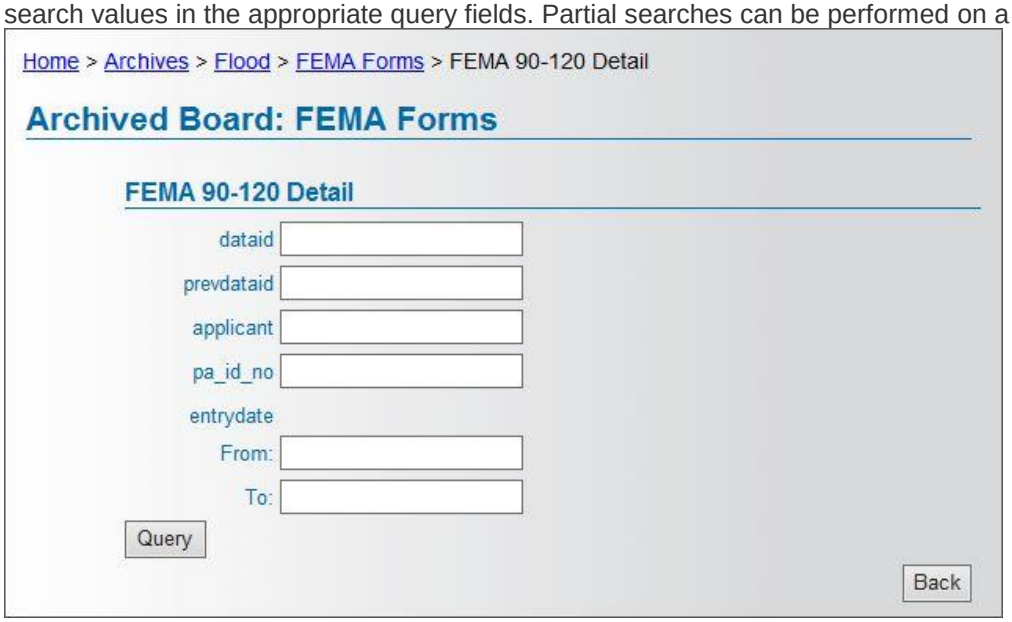
3. To query and display historical data for a board, select the **name** of the board from the *Boards* list.



4. If multiple views were configured for the board at the time the incident was archived, select the **view** from the *View* drop-down list, and select the **Next** button.



5. In the *Archived Board* window, enter **search criteria** into the query fields available for the selected board view. If you wish to view all data, leave all query fields blank. Narrow the search by entering search values in the appropriate query fields. Partial searches can be performed on a field.



The following formats may be used when including date and/or time criteria in the search.

- US Date formats: mm/dd/yyyy (for example, 05/27/2007) or [Month] [Day], [Year] (for example, May 27, 2007)
- International Date formats: yyyy/mm/dd (for example, 2007/05/27) or [Year] [Month] [Day], (for example, 2007 May 27)
- Time formats: hh:mm:ss (for example, 21:35) or hh:mm:ss AM/PM (for example, 8:00:15 AM, 8:00:15 PM)

Note: A 12 or 24 hour clock may be used. AM/PM designation may be entered as lower or upper case.

6. Select the **Back** button to return to the *Archive* window, or select the **Query** button to execute the search. Data matching the criteria specified in the query will open in a separate window and display in the original view format for the board or plug-in.

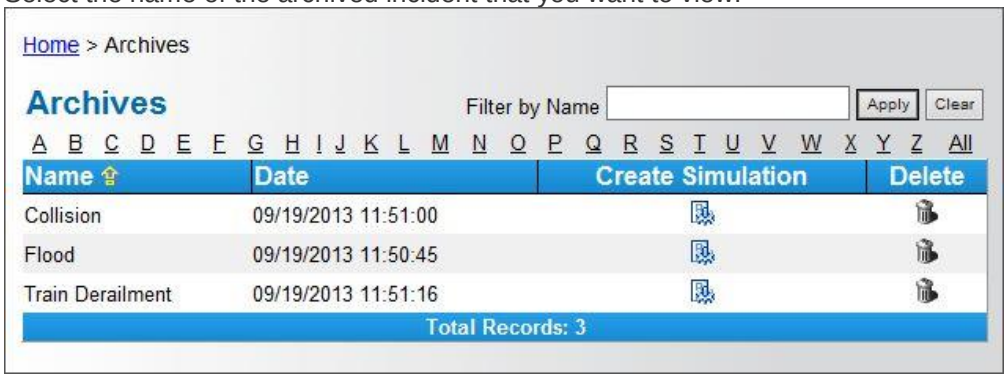
Viewing Plug-in Data for an Archived Incident

Archived plug-in data can only be viewed for the *Checklists* and *Messages* plug-ins.

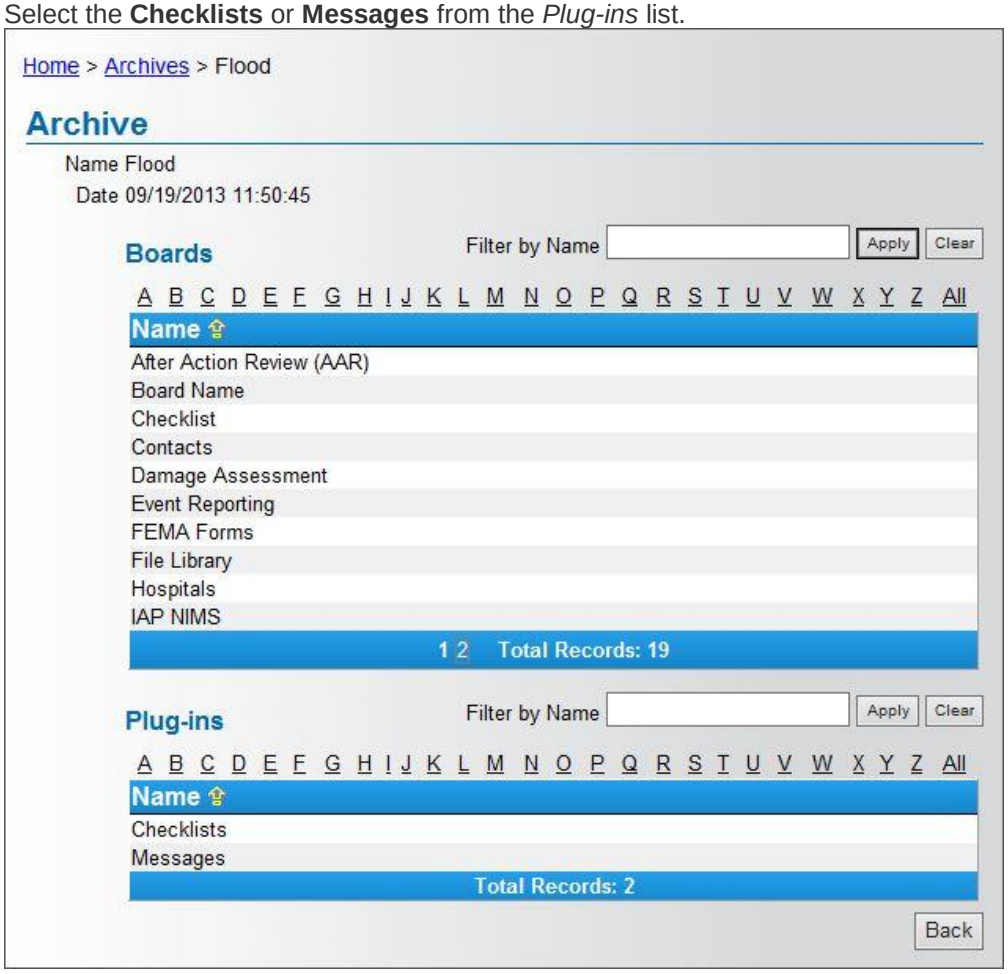
To view plug-in data for an archived incident, follow the steps below.

1. Select the **Archives** link in the *Incidents* section of the admin window.

2. Select the name of the archived incident that you want to view.



3. Select the **Checklists** or **Messages** from the *Plug-ins* list.



4. If you select **Checklists**, select the **checklist** from the drop-down list. If you selected **Messages**, skip to step 6.

5. When you select the **checklist**, it will appear in the window. Select the **Back** button to return to the *Archive* window.

6. If you select **Messages**, all of the messages for the archived incident will appear in the *Messages* window.

7. To generate a hardcopy of the preview window, right-click in the display window and use the print option in your browser.

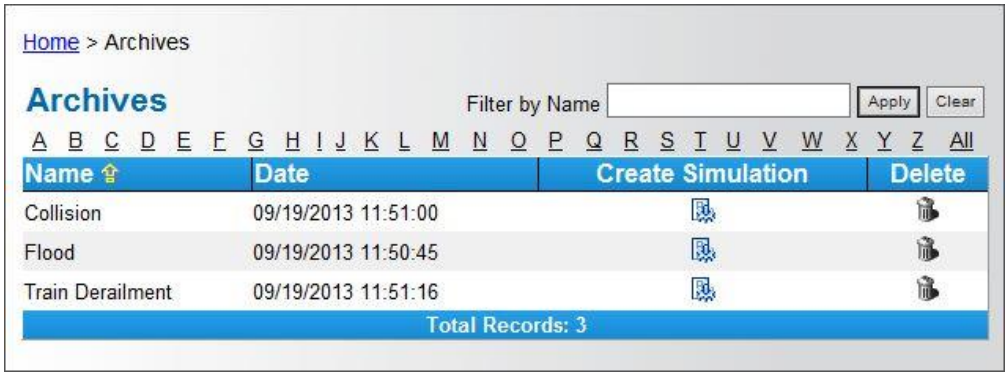
Note: Complex boards or extensive data sets can be printed through the Reporter manager where specific data fields can be specified, filtered, and sorted.

Simulating an Archive

To simulate an archive, follow the steps below.

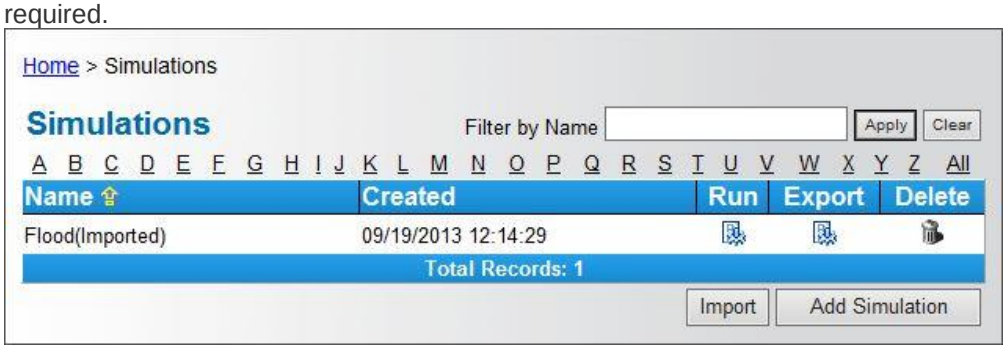
1. Select the **Archives** link in the *Incidents* section of the admin window.

2. Select the **Create Simulation icon** next to the name of the incident.



3. When the confirmation dialog box appears, select the **OK** button to create the simulation, or select the **Cancel** button to abort the operation.

4. Select the **Simulator** link in the *Incidents* section of the admin window to confirm that the simulation was created in the *Simulator* manager. The newly created simulation will reflect the same name assigned to the archive and appended with (Imported). The simulation can now be edited as required.



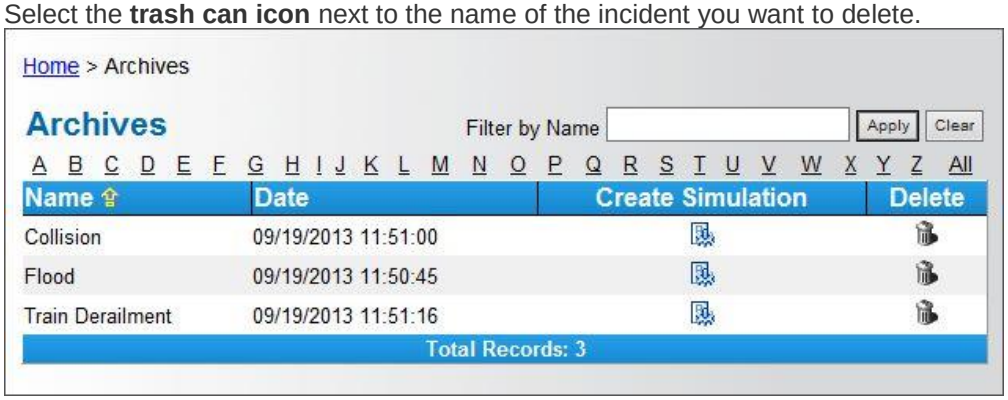
When an archive has been simulated, it is possible that boards and field data may not transfer intact. This will occur if a board has since been deleted from the system or field names in a board have been changed or deleted. For detailed instructions on running a simulation, see *The Simulator Manager* section in this topic.

Deleting an Archive

Deleting an archive permanently removes the incident and all associated information from the system.

To delete an archive, follow the steps below.

1. Select the **Archives** link in the *Incidents* section of the admin window.
2. Select the **trash can icon** next to the name of the incident you want to delete.



3. When the delete confirmation dialog box appears, select the **OK** button to delete the archive, or select the **Cancel** button to abort the operation.

The Incidents Manager

WebEOC is an incident-based information management system, capable of managing multiple incidents simultaneously yet separately. This is critical for organizations that function in an oversight or regulatory role and, by the very nature of their business, must manage and/or track multiple incidents, or that has an industry structure involving multiple operating sites.

Each new incident (or event) is set up or an existing incident modified through the Incidents manager in the Admin window and is maintained as an active incident until it is archived.

At the start of an incident, users create the new incident in the system and assign applicable groups. During log in, the Incident drop-down list will be filtered based on the group permissions of the responder. Responders can begin posting information after the incident is selected and the responder successfully logs in to the system.

With WebEOC, agencies and users can track individual incidents or include multiple incidents in a common master view. This master view feature is discussed in detail in “The Master Views Manager” section in this topic.

Users with access to the Incidents manager have the ability to run comprehensive incident reports to include all boards or any combination of boards as determined by the user. All data fields for each board selected will be included in the report.

WebEOC is automatically configured with a Setup incident that can be used to access and set up configurations for any admin manager and configure and manage static data in a board. The Setup incident is not displayed in the Incidents manager list and therefore cannot be deleted from the system.

Setup Incident Overview

Although the Setup incident does not appear in the Incidents manager list, it does appear as a selection in the Incidents drop-down list to either WebEOC administrators or users with admin profile permissions, when they log in to WebEOC.

The Setup incident can be used to perform administrative and configuration functions in WebEOC. Setup is also used to configure pre-canned information that will be duplicated in a static status board for each subsequent created incident.

Data linking is not available in the input view in the user interface when logged in to the Setup incident. Also you cannot run drills or exercises through the Setup incident. Use the Simulator manager to create and run drills or exercises.

Static Entries in Setup

When administrators are logged in to the Setup incident, pre-canned or static entries can be added, updated, or deleted using the standard data entry functions through the applicable input view. Two examples where static entries are used:

- An agency that routinely completes a set of tasks for any incident can configure the status board as static (through the Boards manager) and add the tasks to the specified status board through Setup. Whenever a new incident occurs, the precanned entries will be automatically displayed on

the board. If any of the tasks need to be changed, the static entries can be updated and processed as any other board entry.

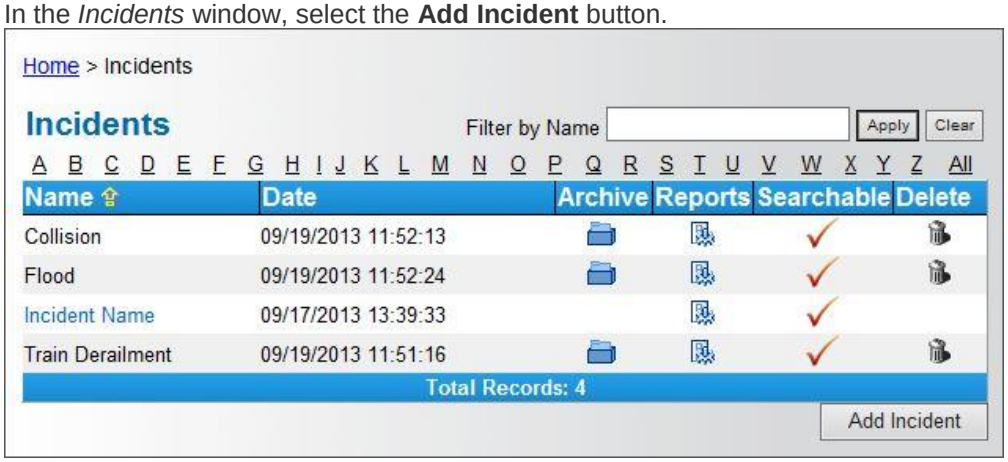
- Pre-canned entries can also be used in a shelter board listing the shelter name, its capacity or other available features. During an annual review, if a change occurs to your available shelter, you can edit or delete the static entry to keep your pre-canned shelter board information current.

Adding a New Incident

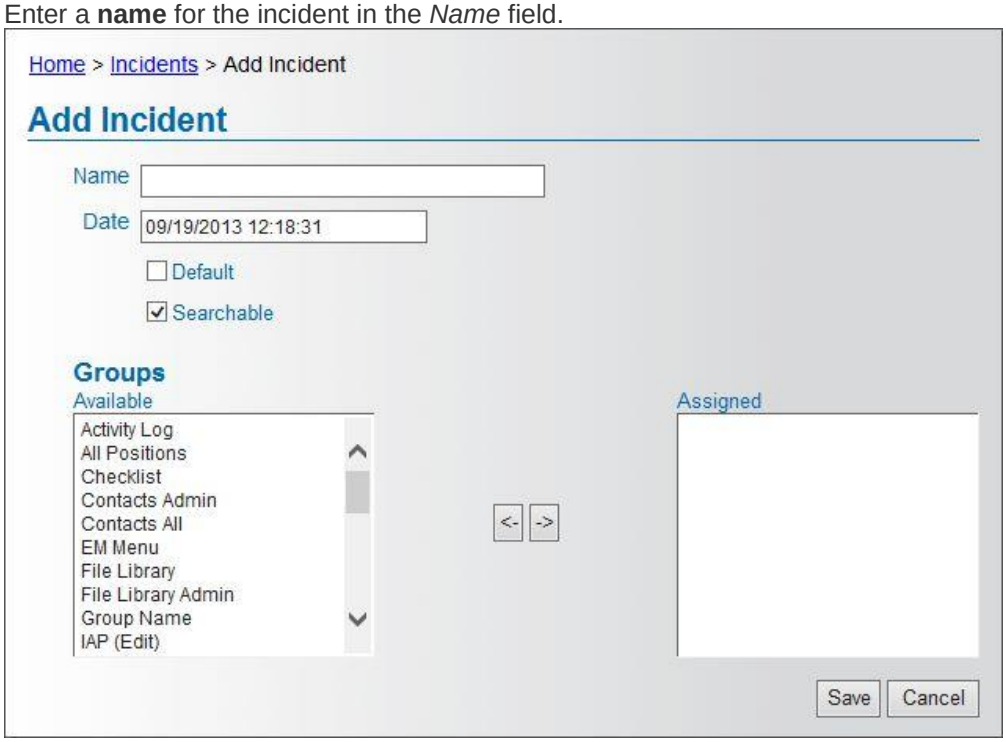
To add a new incident, follow the steps below.

1. Select the **Incidents** link in the *Incidents* section of the admin window.

2. In the *Incidents* window, select the **Add Incident** button.



3. Enter a **name** for the incident in the *Name* field.



4. The date is automatically set to the current date and time. If you want to change the date, delete the text, and enter a **new date**, formatted: mm/dd/yyyy hh:mm:ss (month, day, year, hour, minutes, and seconds). The incident time is used to calculate the due times of checklist items configured with an ETime.

Note: If an invalid format is used, or the Date field is left blank, the incident will not save and an error message will appear in red next to the Date field.

5. Select the **Default** check box if you want the incident to appear as the default when users are logging in to WebEOC. When logging in, a user can select a different incident if he or she is a member of a group assigned to that incident.

Note: The last incident selected as the default will override the previously selected default.

6. In order for users to access an incident, a WebEOC administrator must assign it to their group or groups. Select the **group** from the *Available* list that you want to assign to the incident, and select the **right arrow** to move the group to the *Assigned* list.

Note: If there are no master views set up in your instance, the Master Views section will not appear in the Edit Incident window.

7. Select the **Save** button to save the incident, or select the **Cancel** button to abort the operation.

Editing an Incident

As the scale, nature or cause of an incident becomes apparent, it might be necessary to edit the incident in WebEOC.

To edit an incident, follow the steps below.

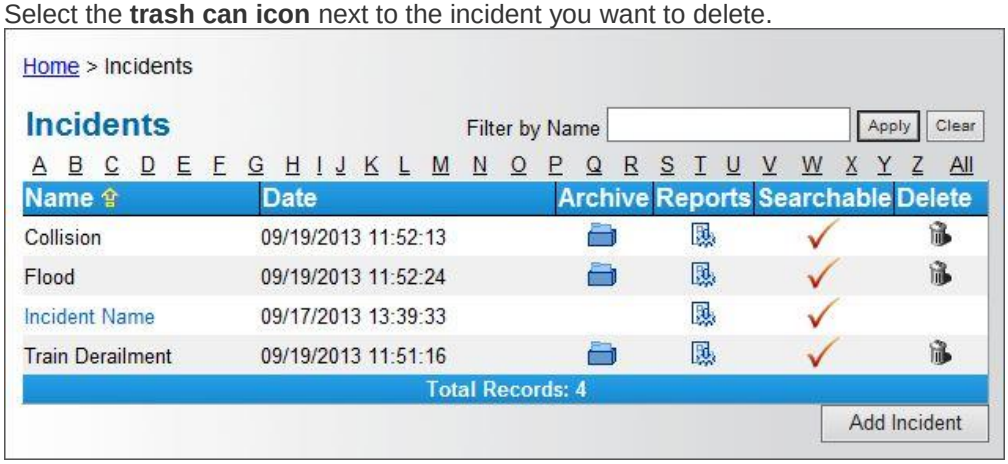
1. Select the **Incidents** link in the *Incidents* section of the admin window.
2. Select the **name** of the incident you want to edit from the *Incidents* window.
3. In the *Edit Incident* window, make your changes.
4. Select the **Save** button to save the incident, or select the **Cancel** button to abort the operation.

Deleting an Incident

If you delete an incident, all information associated with the incident will be deleted from the system and cannot be retrieved. Therefore, if an incident contains useful data, consider archiving it rather than deleting it.

To delete an incident, follow the steps below.

1. Select the **Incidents** link in the *Incidents* section of the admin window.
2. Select the **trash can icon** next to the incident you want to delete.



Note: You cannot delete the incident you are currently logged into. If you want to delete the incident you are logged in to, log out of WebEOC and log back in to a different incident.

3. When the delete confirmation dialog box appears, select the **OK** button to delete the incident, or select the **Cancel** button to abort the operation.

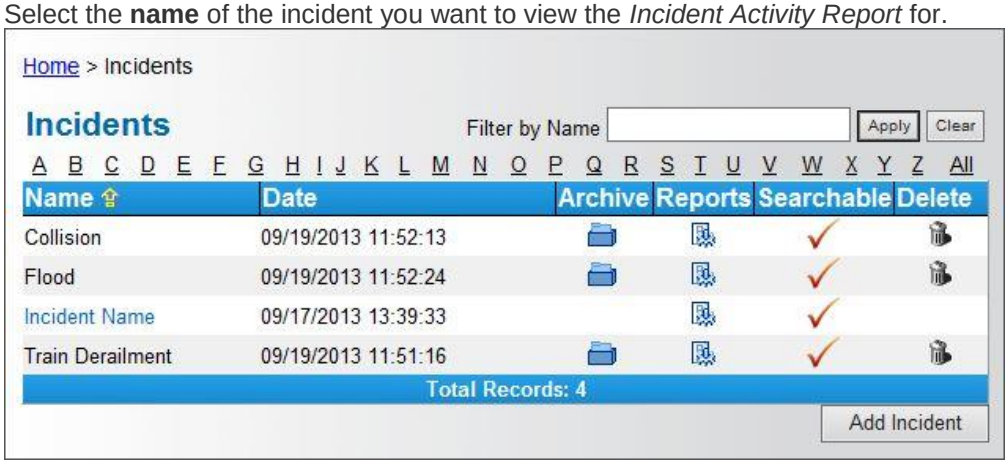
Viewing the Incident Activity Report

The Incident Activity Report lists the users who have logged in to a specific incident, their position, their last successful log-in date, and their last log-out date. This report generates in PDF format and will assist you in managing access to incidents.

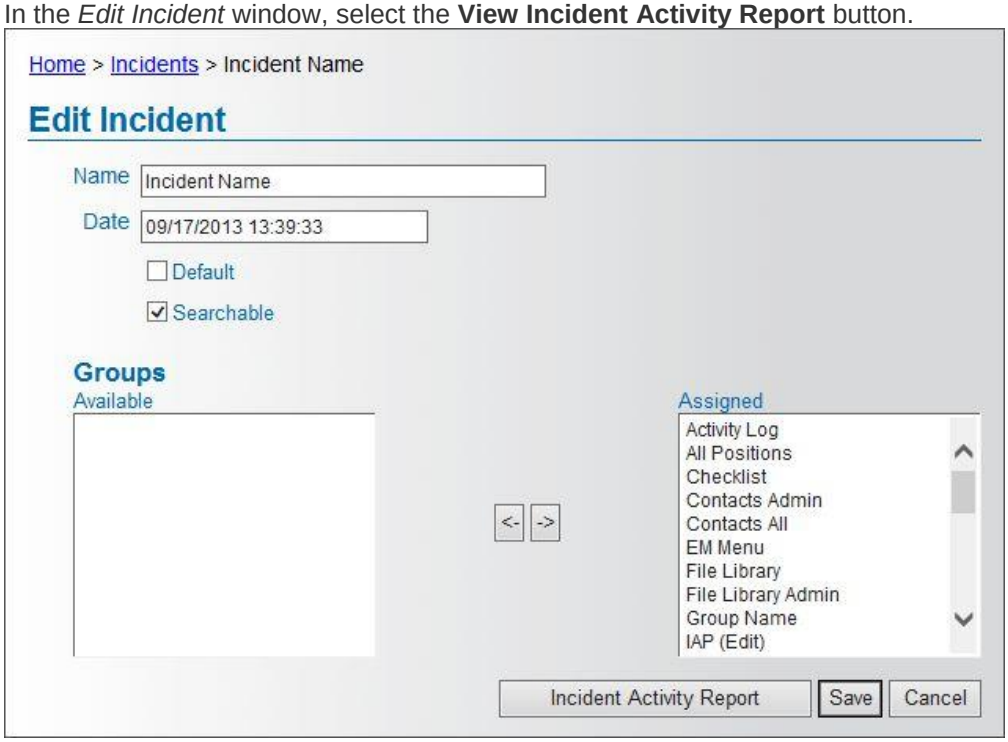
To view the Incident Activity Report, follow the steps below.

1. Select the **Incidents** link in the *Incidents* section of the admin window.

2. Select the **name** of the incident you want to view the *Incident Activity Report* for.



3. In the *Edit Incident* window, select the **View Incident Activity Report** button.



4. In the *Incident Activity Report* window, select the **View Report** button to open the Incident Activity Report in a new window or select the **Export to CSV** button to export the Incident Activity Report in a CSV file. Opening the Incident Activity Report in a new window will allow you to print it as a PDF.

Archiving an Incident

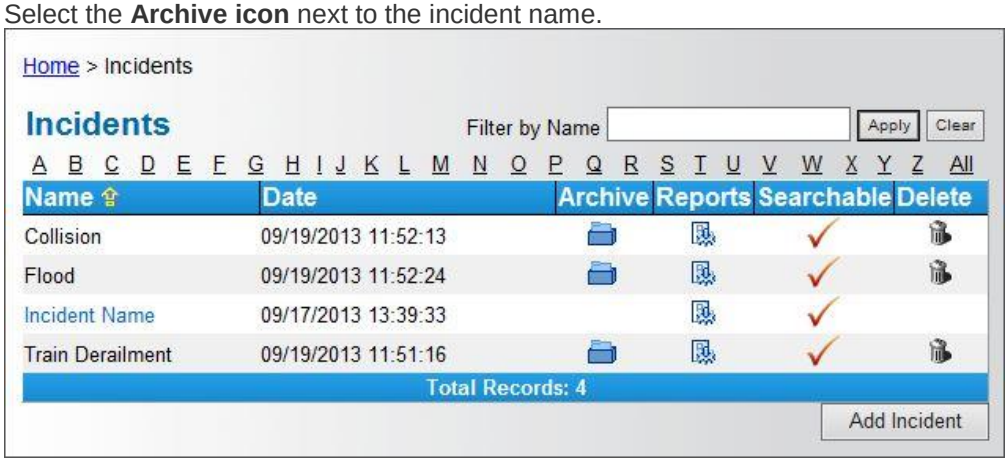
Archiving an incident moves all of the incident information (entries, checklists, messages, and some plugin data) to the history tables in the system. After an incident is archived, administrators may, at a future date, view information in its original display format through the Archives manager or run reports through WebEOC Reporter.

Note: Entries marked "Incident Independent" are not archived.

To archive an incident, follow the steps below.

1. Select the **Incidents** link in the *Incidents* section of the admin window.

2. Select the **Archive icon** next to the incident name.



Note: You cannot archive the incident you are currently logged in to. If you are currently logged in to the incident that you wish to archive, you must log out of WebEOC and log back in to a different incident.

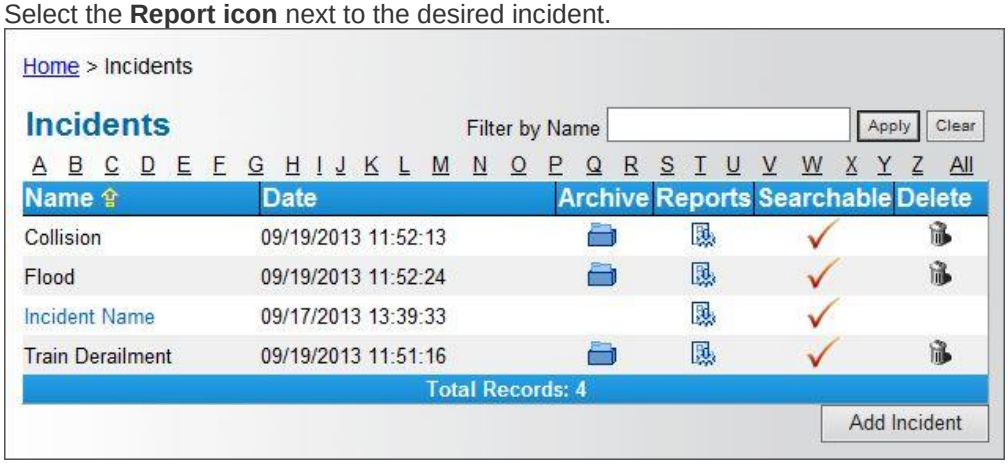
3. When the confirmation dialog box appears, select the **OK** button to archive the incident, or select the **Cancel** button to abort the operation. The incident is removed from the Incidents window and added to the *Archives* manager.

Running an Incident Report

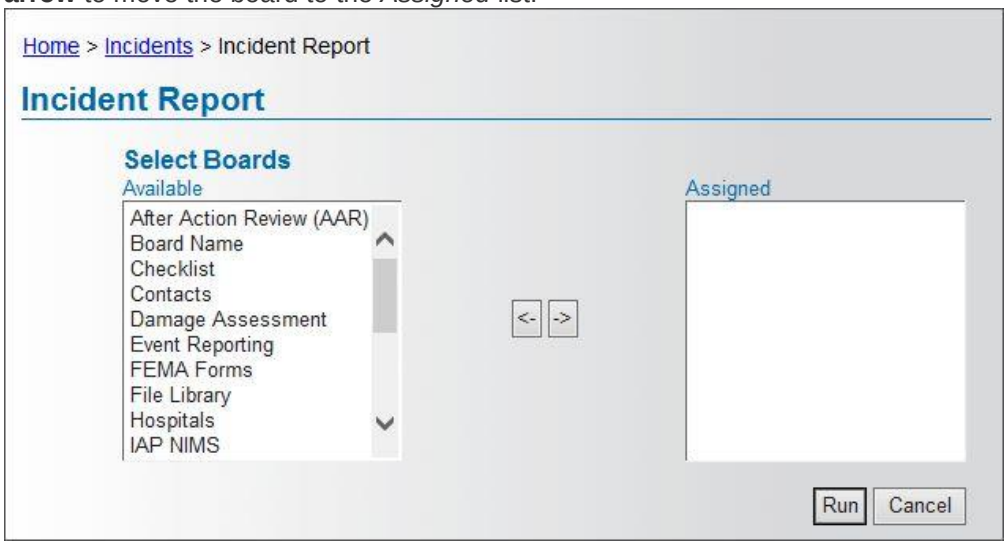
To run a report on an incident, follow the steps below.

1. Select the **Incidents** link in the *Incidents* section of the admin window.

2. Select the **Report icon** next to the desired incident.



3. Select the **board** from the *Available* list that you want to include in the report, and select the **right arrow** to move the board to the *Assigned* list.



Note: Only those selected boards containing data will appear in the report.

4. After you have selected the boards to include in the report, select the **Run** button.

5. The report will opens in a new window. Select the **Print Report** link to generate a hardcopy, or select the **Close Window** link to close the report preview window.

The Master Views Manager

In WebEOC, organizations can track individual incidents or combine multiple incidents for viewing in a common master view. Once configured by an administrator in the Master Views manager, a user logged in to the master view can view the data from all sub-incidents together or on a per incident basis by selecting the appropriate incident filter on each board display. The ability to view the master view, along with its sub-incidents, is available only to those users with the appropriate group permissions.

The option to track multiple incidents simultaneously yet separately, or rolled up into master views, means that a local EOC can track their own ongoing emergency while a district EOC combines several local incidents into a master view, and at the same time the state EOC could have a master view of all regional incidents. Each tier's information can have a different level of detail based on the information requirements for each organization.

Users select which incident or master view to participate in when logging in to WebEOC. Master views are not themselves incidents; instead they are a view of information from selected incidents. Incidents are archived to and retrieved from the database on a per incident basis. If a member incident (sub-incident) of a master view is archived, all information related to the archived incident is removed from all boards and plug-ins in the master view when displays are refreshed.

Logging in to a Master View

Master views and assigned sub-incidents are easily identified when logging in to WebEOC.

- Master views and incidents that have not been assigned to a master view are displayed left-justified in the Incident drop-down list.

- Sub-incidents assigned to master views are grouped together immediately under the master view and preceded by three short dashes.
- If an incident is assigned to more than one master view, it will appear under each master view to which it is assigned.

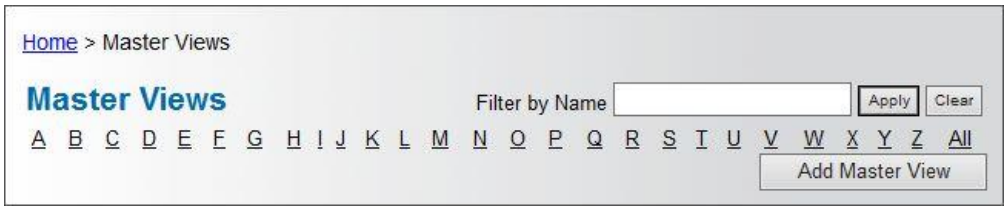
- A master view with no assigned sub-incidents will not appear in the login window.

Adding a Master View

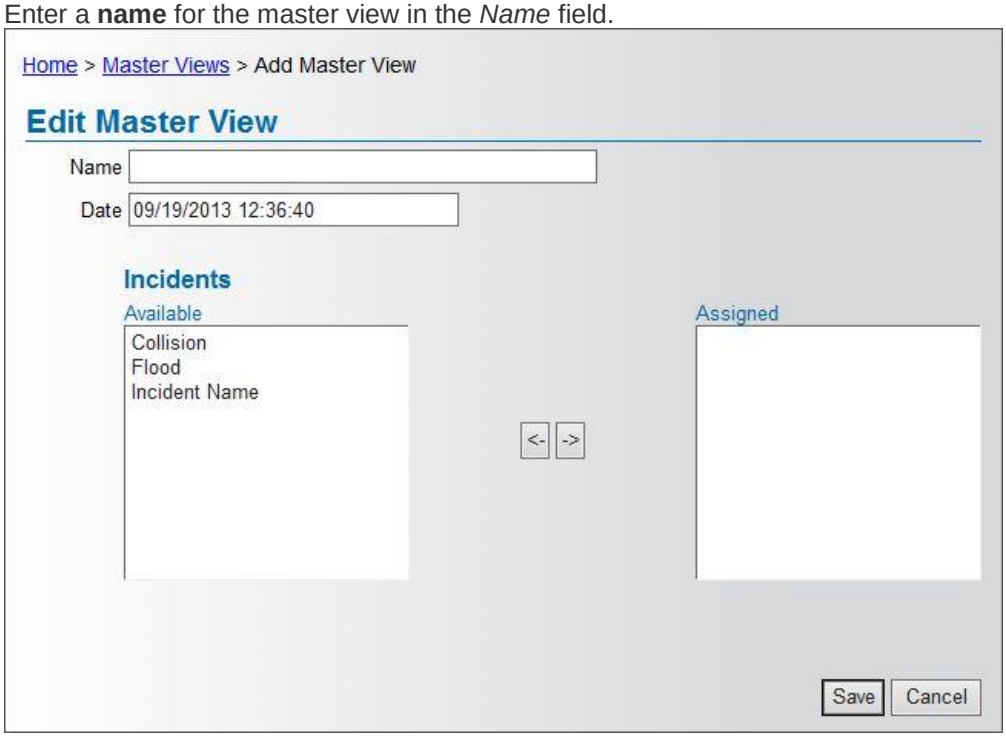
To create a new master view, follow the steps below.

1. Select the **Master Views** link in the *Incidents* section of the admin window.

2. Select the **Add Master View** button in the *Master Views* window.



3. Enter a **name** for the master view in the *Name* field.



4. The date is automatically set to the current date and time. If you want to change the date, delete the text, and enter a **new date**, formatted: mm/dd/yyyy hh:mm:ss (month, day, year, hour, minutes, and seconds).

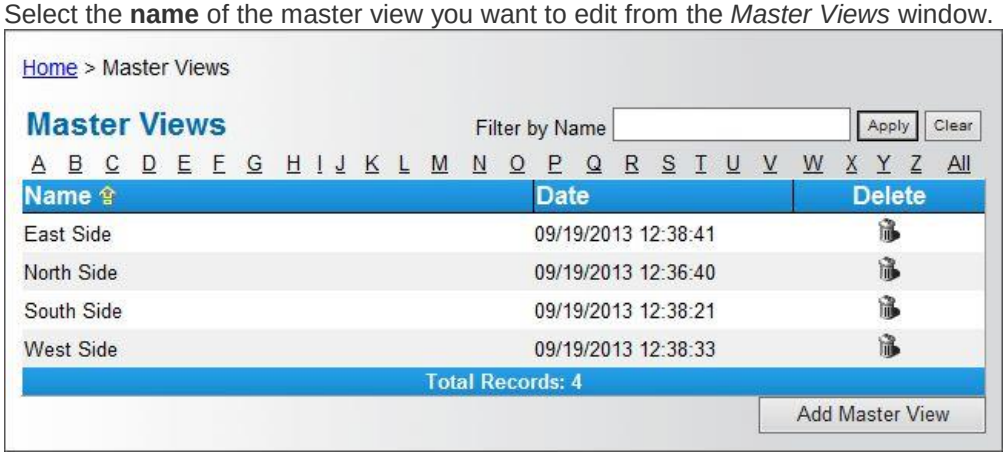
5. Select the **incidents** from the *Available* list that you want to assign to the master view, and select the **right arrow** to move the incidents to the *Assigned* list. Any changes you make to incident assignments in the *Master Views* manager will automatically update in the *Incidents* manager.

6. Select the **Save** button to create the master view, or select the **Cancel** button to abort the operation.

Editing a Master View

To edit a master view, follow the steps below.

1. Select the **Master Views** link in the *Incidents* section of the admin window.
2. Select the **name** of the master view you want to edit from the *Master Views* window.


Home > Master Views
Master Views
Filter by Name
Apply
Clear
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All
Name
Date
Delete
East Side 09/19/2013 12:38:41
North Side 09/19/2013 12:36:40
South Side 09/19/2013 12:38:21
West Side 09/19/2013 12:38:33
Total Records: 4
Add Master View

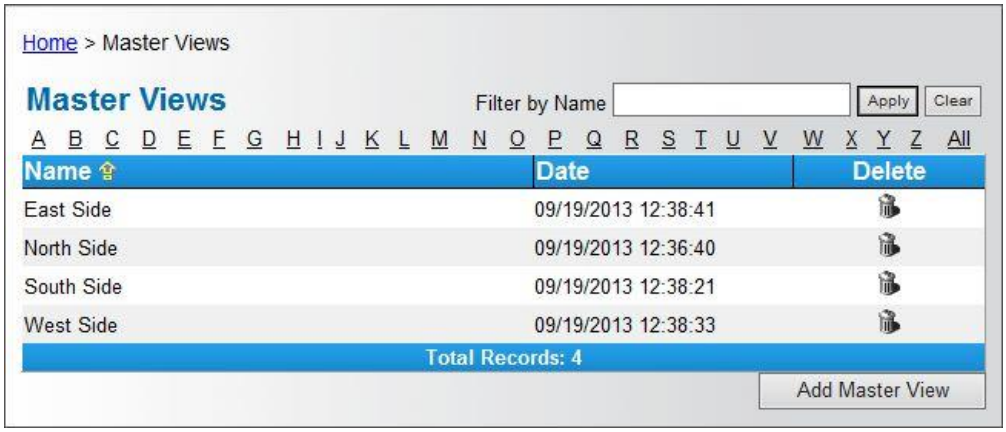
3. Make your changes in the *Edit Master View* window.
4. Select the **Save** button to save your changes, or select the **Cancel** button to abort the operation.

Deleting a Master View

Deleting a master view does not delete the incidents.

To delete a master view, follow the steps below.

1. Select the **Master Views** link in the *Incidents* section of the admin window.
2. Select the **trash can icon** next to the name of the master view to be deleted.

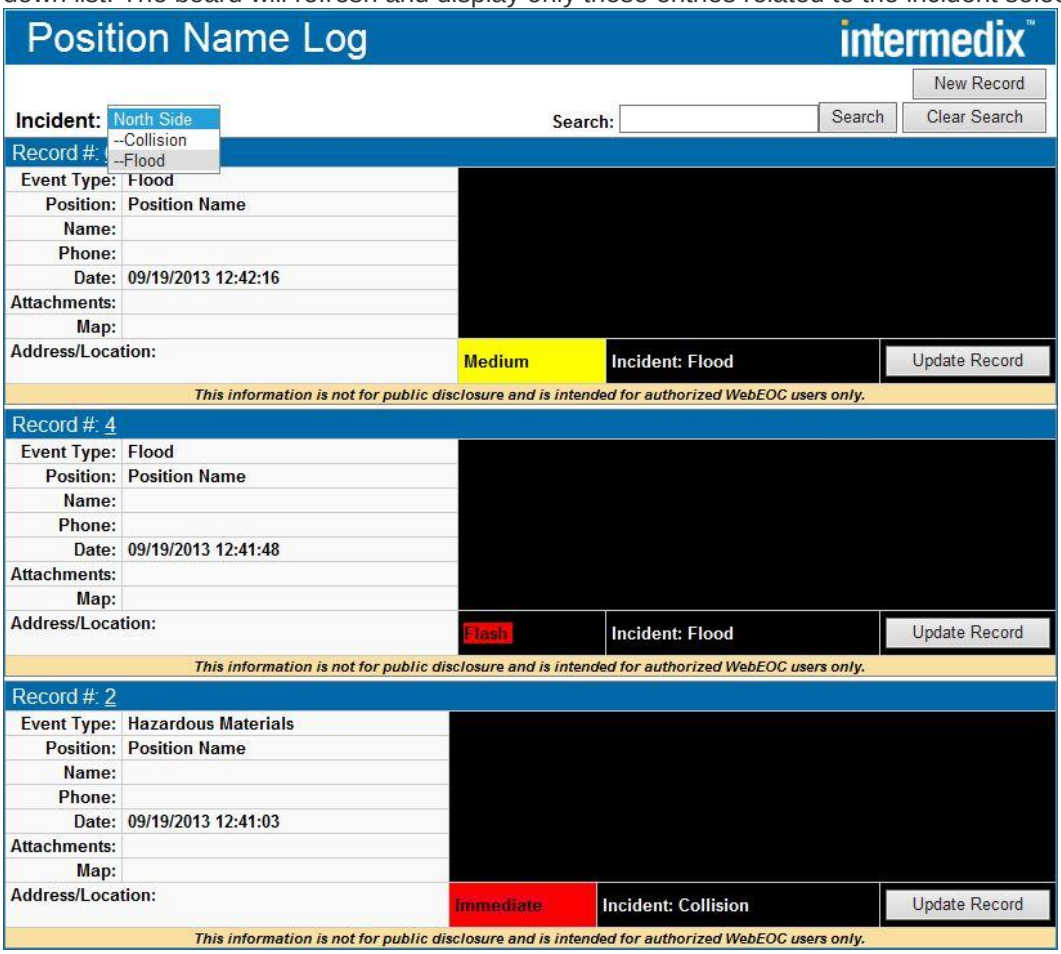

Home > Master Views
Master Views
Filter by Name
Apply
Clear
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All
Name
Date
Delete
East Side 09/19/2013 12:38:41
North Side 09/19/2013 12:36:40
South Side 09/19/2013 12:38:21
West Side 09/19/2013 12:38:33
Total Records: 4
Add Master View

3. When the delete confirmation dialog box appears, select the **OK** button to delete the master view, or select the **Cancel** button to abort the operation.

Managing a Master View

When status board entries from multiple incidents are viewed collectively in a master view, a filter drop-down list will be added in the upper left corner of each board.

To display entries for an individual incident in the master view, select the incident from the filter drop-down list. The board will refresh and display only those entries related to the incident selected.



Note: You can design or modify a board to display the name of the incident next to each entry. This is done in the Advanced Board Editor by including the system field named "incident" in the board view. A board configured in this fashion and displayed through a master view enables users to easily relate each entry to its respective incident. See the Basic Board Building topic for detailed instructions on modifying boards.

Information is entered, updated, and managed from a master view in much the same way as users do when logged into an individual incident. Like board master views, the input view contains an incident

drop-down list when logged in to a master view. Select the incident from the drop-down list, and complete the data or settings. Information is posted and recorded to the incident selected from the list.

If only one sub-incident is assigned to the master view, the incident drop-down list will not appear in the input view or display view. It is assumed that all data will be associated with the single sub-incident.

When updating board entries in a master view, the incident drop-down list will not appear in the input view. The incident was determined when the entry was initially entered.

The Reporter Manager

In addition to real-time access to emergency information, WebEOC provides extensive information retrieval and reporting capabilities. Agencies can generate an unlimited number of preformatted or ad hoc reports based on individual status boards. Preformatted reports can be added as a link to the control panel.

Use the Reporter manager if:

- You need greater filtering capabilities than are present in the Archives manager,
- You need to sort archived data, or
- You want the information presented in a report format.

An unlimited number of user-defined reports can be developed for both default and locally developed status boards.

Two types of board reports are available: Standard and Custom. The Standard Report is built using standard Reporter manager tools. The Custom Report is built using HTML and can be developed in an external editor, such as Adobe® Dreamweaver®, and then pasted into the Reporter manager.

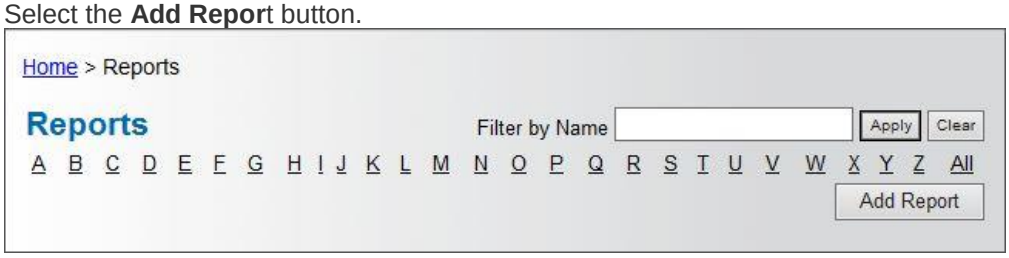
A multi-board incident report can be generated through the Incident manager.

Creating a Standard Board Report

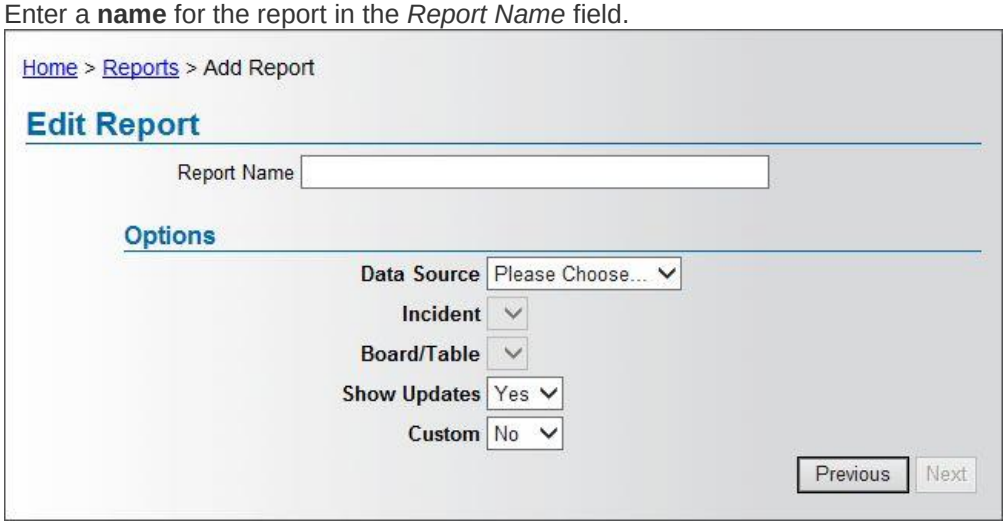
To create a standard board report, follow the steps below.

1. Select the **Reporter** link in the *Incidents* section of the admin window.

2. Select the **Add Repor**t button.

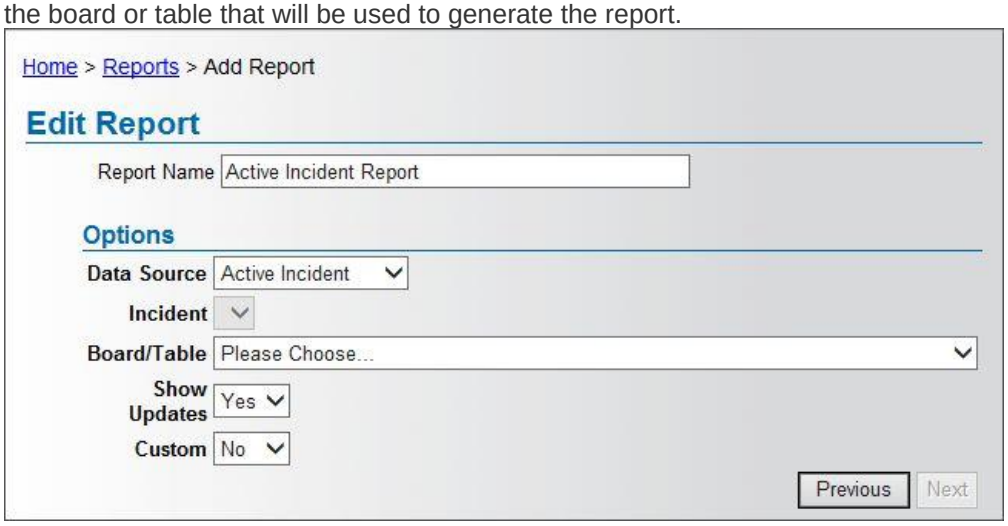


3. Enter a **name** for the report in the *Report Name* field.

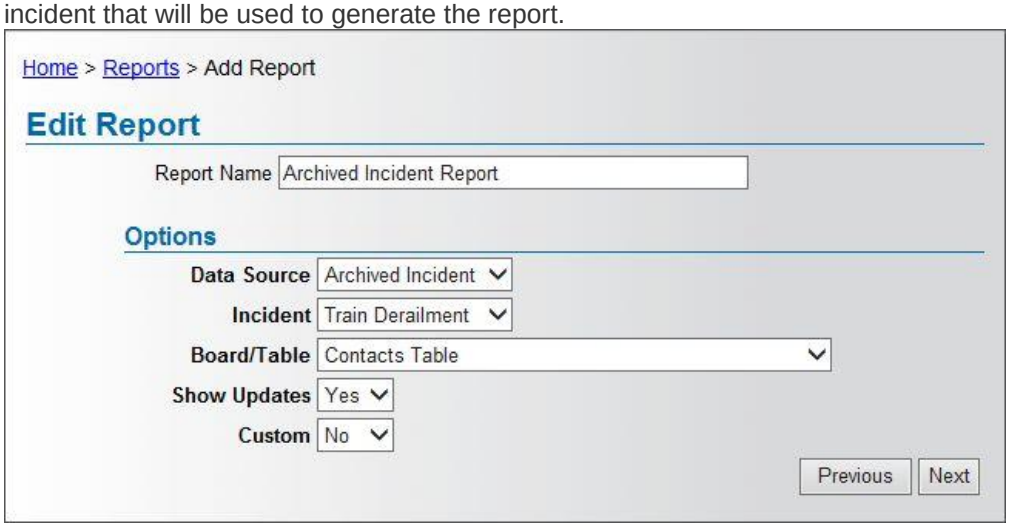


4. From the *Data Source* drop-down list, select either **Active Incident** or **Archived Incident**.

5. If you select *Active Incident*, select the **board** or **table** from the *Board/Table* drop-down list. This is the board or table that will be used to generate the report.



6. If you select *Archived Incident*, select the **incident** from the *Incident* drop-down list. This is the incident that will be used to generate the report.



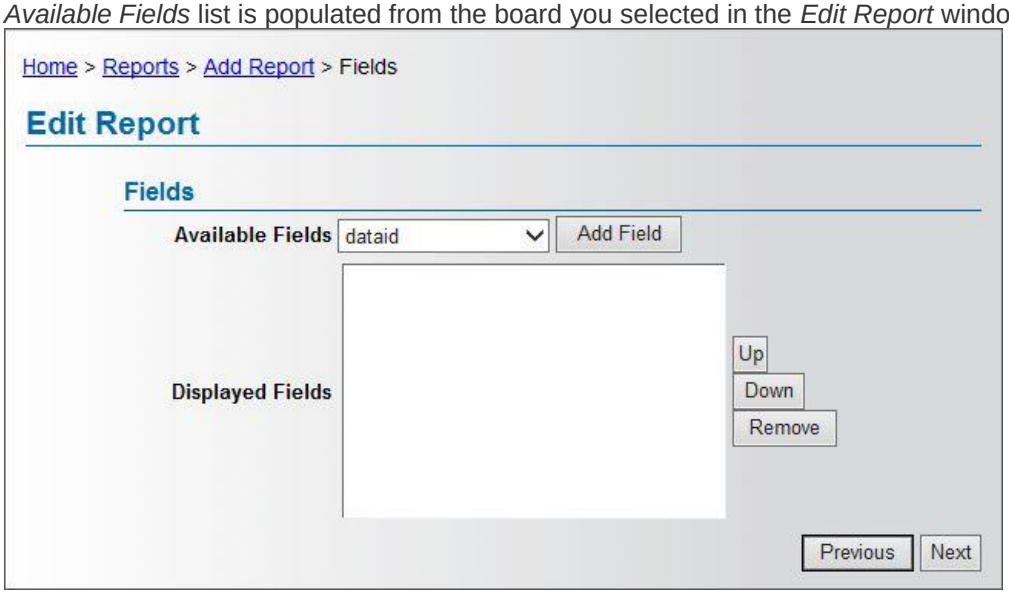
7. From the *Show Updates* drop-down list, select either **Yes** or **No**. If you select *Yes*, the report will include all updates that have been made to an entry. When updates are included, the initial entry and any updates made will appear in the report. If you select *No*, the report will include only the last update made to an entry.

8. From the *Custom* drop-down list, select **No**. This feature is detailed in the *Adding a Custom (HTML) Report* section in this topic.

9. Select the **Next** button to continue to the *Edit Report Fields* window, or select the **Previous** button to return to the *Reports* window.

10. The *Edit Report Fields* window allows you to add the data fields that will be included in the report. Select a **field** from the *Available Fields* drop-down list, and select the **Add Field** button. The

Available Fields list is populated from the board you selected in the *Edit Report* window.

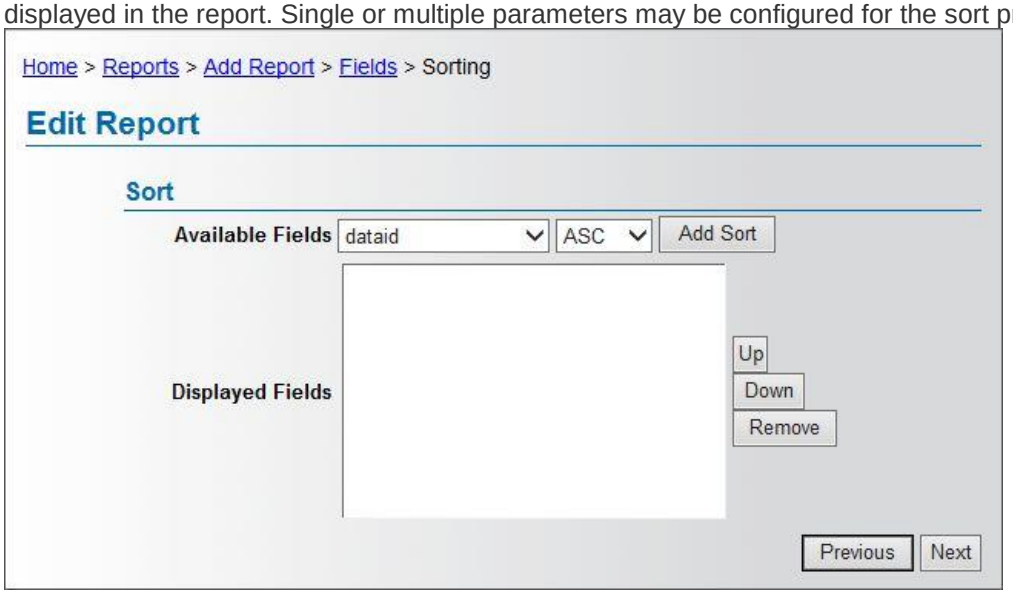


Note: If this is an existing report and the board/table was changed, you must remove and/or add data fields corresponding to the board currently selected.

11. Repeat step 10 for each data field you want to include in the report. After adding the fields, you can change the order the fields will display in the report by selecting the **field**, and selecting the **Up** or **Down** button. To delete a field, select the **field**, and select the **Remove** button.

12. When you have finished selecting and ordering the data fields, select the **Next** button to continue to the *Edit Report Sort* window, or select the **Previous** to return to the *Edit Report Fields* window without saving your changes.

13. Use the *Edit Report Sort* window to establish the parameters on which entries will be sorted and displayed in the report. Single or multiple parameters may be configured for the sort protocol.



14. Select the **field** from the *Available Fields* drop-down list. The list is based on the board specified for the report in the *Edit Report* window. Sort criteria using fields that have been configured as [TEXTAREA] in the *Boards* manager are not supported and, if configured, will not be executed.

Note: If this is an existing report and the board/board table was changed, you must remove and/or add data fields corresponding to the board currently selected.

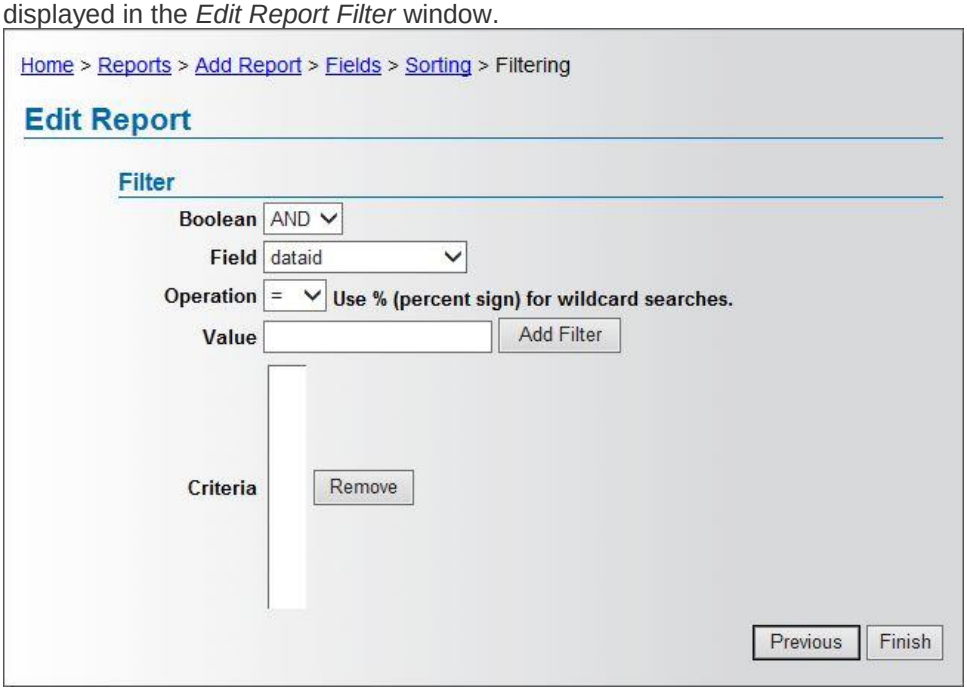
15. Select either **ASC** for ascending or **DESC** for descending from the drop-down list.

16. Select the **Add Sort** button.

17. Repeat the steps for each rule added. As each rule is configured, it is added to the *Displayed Fields* pane. To remove a sort parameter, select the **parameter** in the *Displayed Fields* pane, and select the **Remove** button.

18. After the sort parameters have been set, select the **Next** button to continue to the *Edit Report Filter* window, or select the **Previous** button to return to the *Edit Report Fields* window without saving your changes.

19. The *Edit Report Filter* window allows you to create a single query using one or more criteria to filter board entries included in the final report. The last filter configuration for an existing report is displayed in the *Edit Report Filter* window.



Note: If this is an existing report, and the board/board table was changed, you must remove and/or add the corresponding data fields to the board currently selected.

20. Select **AND** or **OR** from the *Boolean* drop-down list, and select the **field** from the *Field* drop-down list. Where multiple parameters are configured for the query, select **AND** or **OR** for the second and subsequent parameters. If AND/OR is not specified, AND will automatically be appended to the second and subsequent parameters.

Note: See the Query Option Table topic in this section for Boolean descriptions.

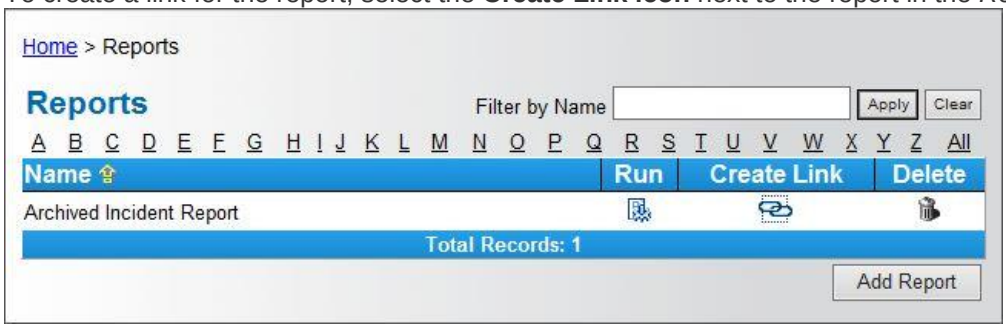
21. Select **=**, **<**, **>**, **<>**, or **LIKE** from the *Operation* drop-down list.

22. Enter a **value** in the *Value* field, and select the **Add Filter** button.

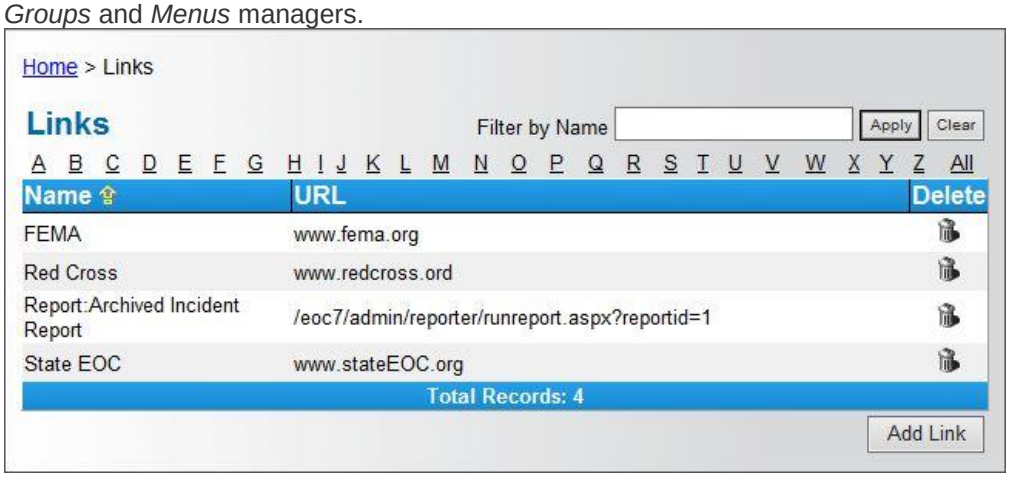
23. The query will appear in the *Criteria* pane. To delete a filter parameter, select the **parameter** in the *Criteria* pane, and select the **Remove** button.

24. After filter queries have been set, select the **Finish** button to save the report parameters, or select the **Previous** button to return to the *Edit Report Sort* window without saving your changes.

25. To create a link for the report, select the **Create Link icon** next to the report in the *Reports* window.



The link is created and added to the *Links* manager and will also appear in the *Available* list in the *Groups* and *Menus* managers.



After you create the report, you need to add the report link to each group profile or menu as applicable.

Query Option Table

If all board entries are to be included in the report, leave the *Criteria* pane blank. A combination of criteria may be configured using simple query statements. Queries are constructed based on the parameters (Boolean and Operation) selected. The table below describes each query parameter.

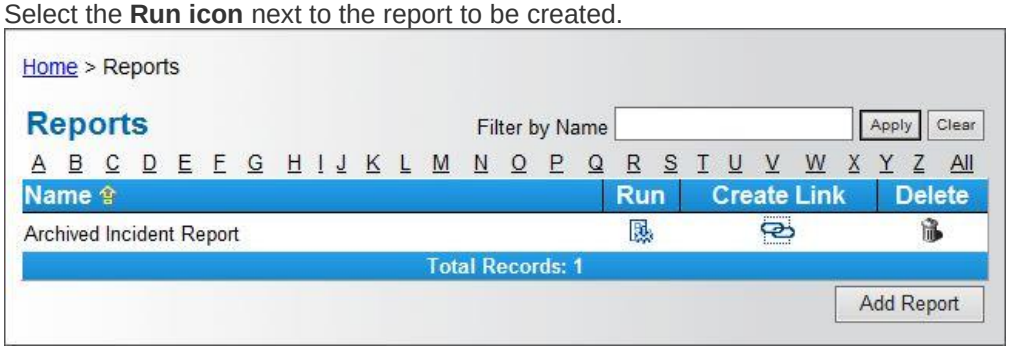
Symbol	Query Option
AND	“AND” is used in multi-query statements to specify that entries must meet all parameters linked by “AND” in order to be included in the report.
OR	“OR” is used in multi-query statements to specify that entries meeting any parameter linked by “OR” will be included in the report.
LIKE	The query result will include matches containing the parameter entered in the Value field. This is comparable to a “contains” query. The wildcard (%) can be used with a “like” query.
=	The query result will include entries that exactly match the parameter entered in the Value field.

<	The query result will include matches that are less than the parameter entered in the Value field (numerically or alphabetically).
>	The query result will include matches that are greater than the parameter entered in the Value field (numerically or alphabetically).
<>	The query result will exclude those entries matching the parameter entered in the Value field.

Running a Board Report

To run a report using the Reporter manager, follow the steps below.

1. Select the **Reporter** link in the *Incidents* section of the admin window.
2. Select the **Run icon** next to the report to be created.



3. If you are running a report for an archived incident, the report is automatically generated and displayed in a report preview window. Skip to step 5. If you are running a report for an active incident, continue to step 4.
4. In the *Run Report* window, select the **incident** from the *Incident* drop-down list.
5. Select the **Run** button to preview the report, or select the **Previous** button to return to the *Reports* window.
6. When the report opens, select the **Print Report** link to generate a hardcopy, or select the **Close Window** link to close the report preview window.

Adding a Custom (HTML) Report

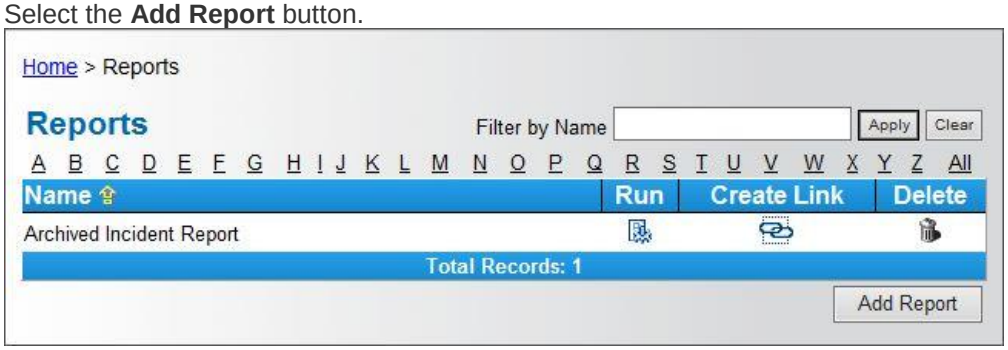
Custom board reports developed in an external HTML editor or WebEOC's board builder can be imported directly into the Reporter manager. The Reporter manager employs HTML tags in addition to several special tags for displaying data. A user must know HTML standards to fully understand the functionality of

special HTML tags supported for the Reporter manager. See the HTML Conventions topic for detailed instructions on using tags.

To add a custom report, follow the steps below.

1. Select the **Reporter** link in the *Incidents* section of the admin window.

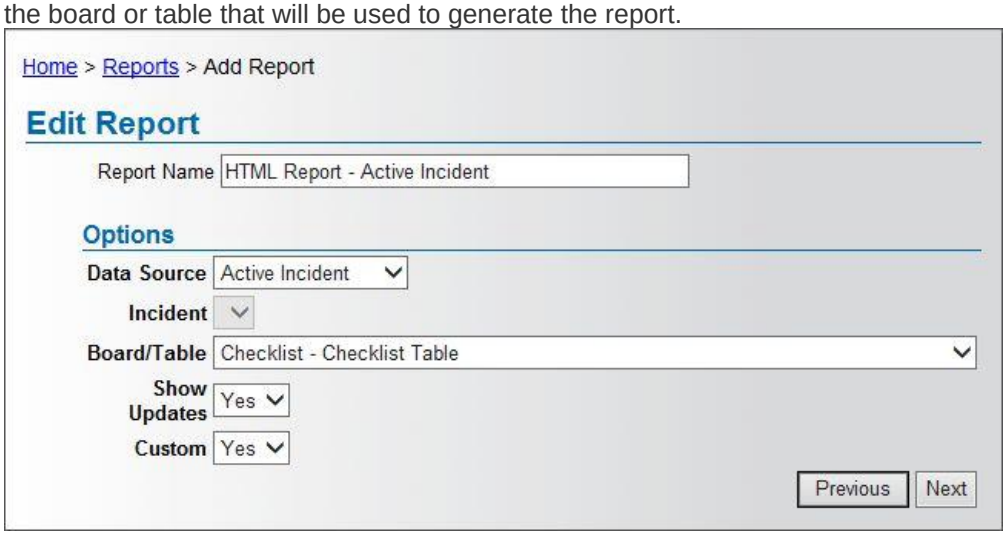
2. Select the **Add Report** button.



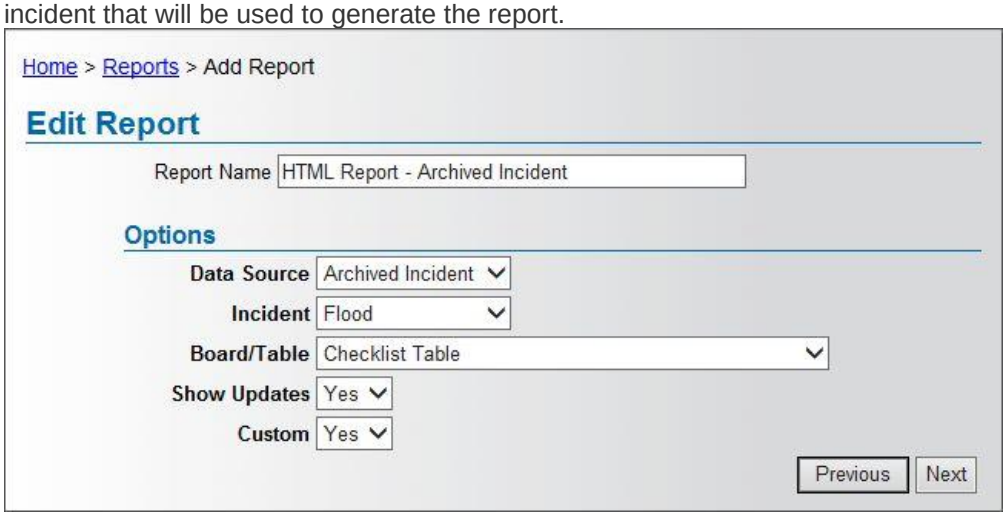
3. Enter a **name** for the report in the *Report Name* field.

4. From the *Data Source* drop-down list, select either **Active Incident** or **Archived Incident**.

5. If you selected *Active Incident*, select the **board** or **table** from the *Board/Table* drop-down list. This is the board or table that will be used to generate the report.



6. If you selected *Archived Incident*, select the **incident** from the *Incident* drop-down list. This is the incident that will be used to generate the report.

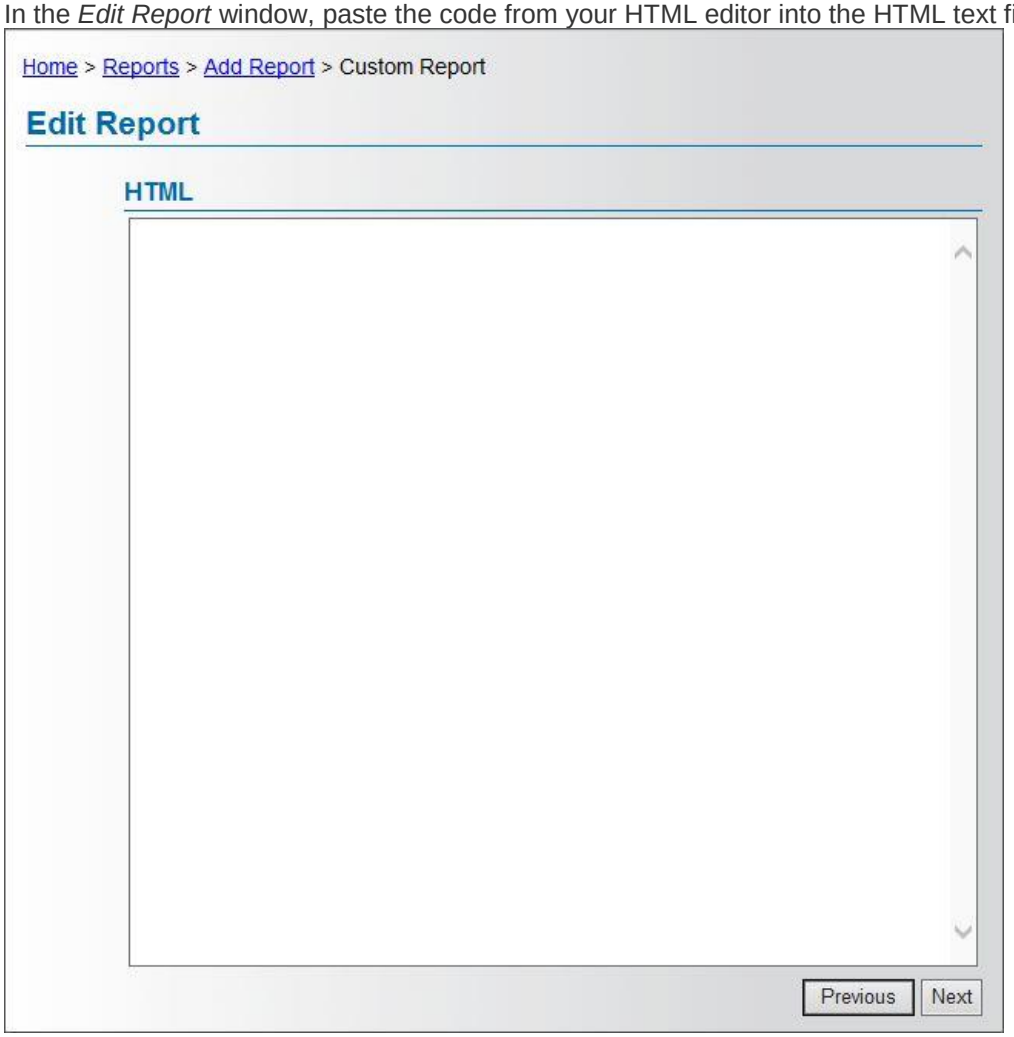


7. From the *Show Updates* drop-down list, select either **Yes** or **No**. If *Yes* is selected, the report will include all updates that have been made to an entry. When updates are included, the initial entry and any updates made will appear in the report. If *No* is selected, the report will include only the last update made to an entry.

8. From the *Custom* drop-down list, select **Yes** from the *Custom* drop-down list.

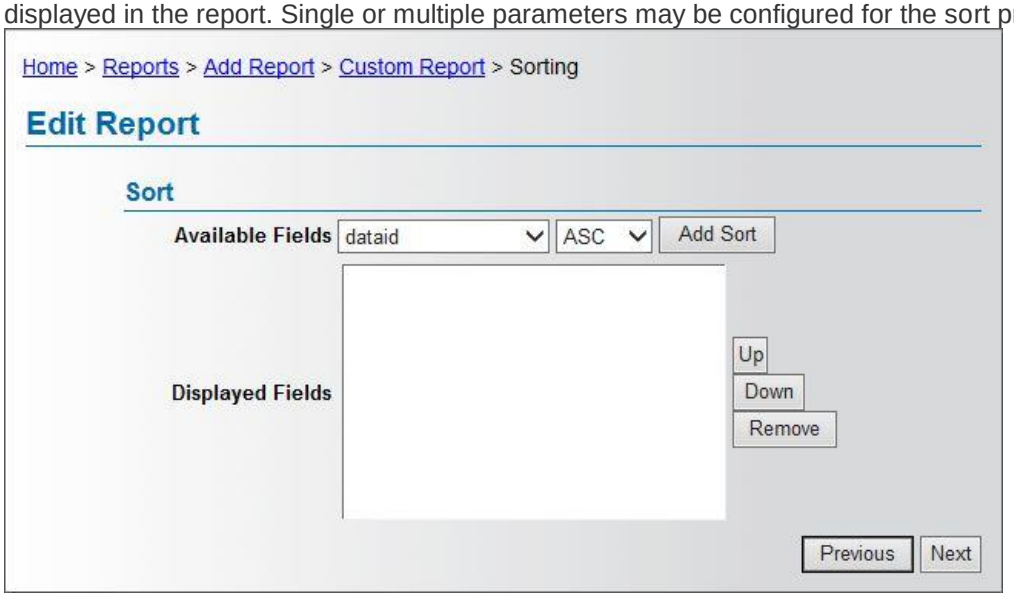
9. Select the **Next** button to continue building the report, or select the **Previous** button to return to the *Reports* window.

10. In the *Edit Report* window, paste the code from your HTML editor into the HTML text field.



11. Select the **Next** button to continue building the report, or select the **Previous** button to return to the *Edit Report* window.

12. Use the *Edit Report Sort* window to establish the parameters on which entries will be sorted and displayed in the report. Single or multiple parameters may be configured for the sort protocol.



13. Select the **field** from the *Available Fields* drop-down list. The list is based on the board specified for the report in *Edit Report* window. Sort criteria using fields that have been configured as [TEXTAREA] in *Boards* manager are not supported and, if configured, will not be executed.

Note: If this is an existing report and the board/board table was changed, you must remove and/or add data fields corresponding to the board currently selected.

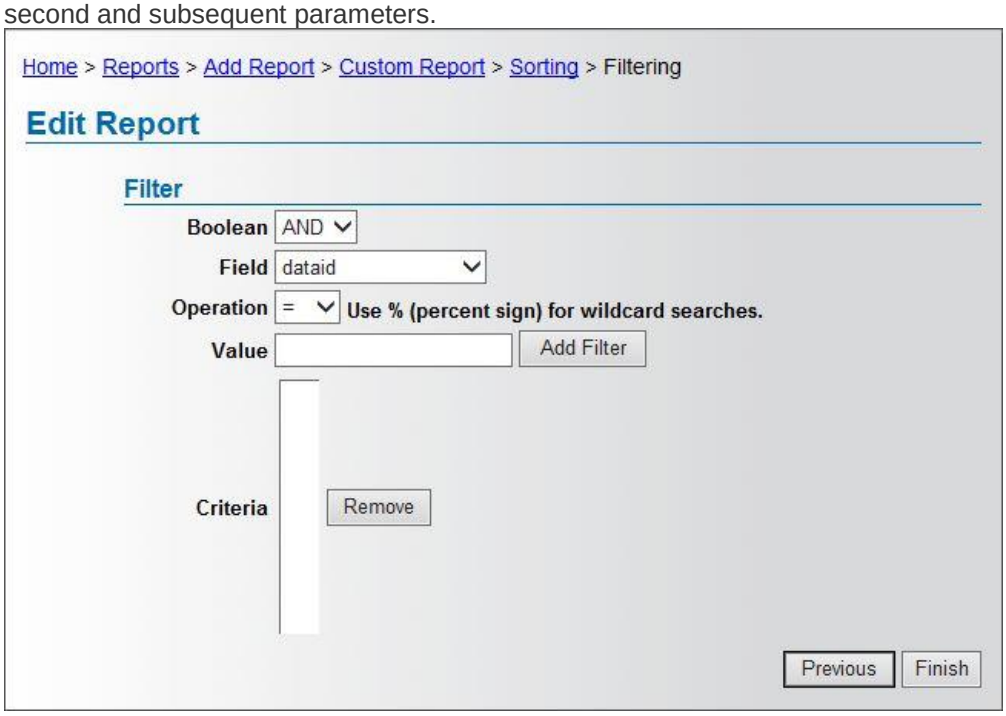
14. Select either **ASC** for ascending or **DESC** for descending from the drop-down list.

15. Select the **Add Sort** button.

16. Repeat the steps for each sort rule added. As each rule is configured, it is added to the *Displayed Fields* pane. To remove a parameter, select the **parameter** in the *Displayed Fields* pane, and select the **Remove** button.

17. After the sort parameters have been set, select the **Next** button to continue to the *Edit Report Filter* window, or select the **Previous** button to return to the *Edit Report Fields* window without saving your changes.

18. Select **AND** or **OR** from the *Boolean* drop-down list, and select the **field** from the *Field* drop-down list. Where multiple parameters are configured for the query, select **AND** or **OR** for the second and subsequent parameters. If AND/OR is not specified, AND will automatically be appended to the second and subsequent parameters.



Note: See the Query Option Table topic in this section for Boolean descriptions.

19. Select **=**, **<**, **>**, **<>**, or **LIKE** from the *Operation* drop-down list.

20. Enter a **value** in the *Value* field, and select the **Add Filter** button.

21. The query will appear in the *Criteria* pane. To delete a filter parameter, select the **parameter** in the *Criteria* pane, and select the **Remove** button.

22. After filter queries have been set, select the **Finish** button to save the report parameters, or select the **Previous** button to return to the *Edit Report Sort* window without saving your changes.

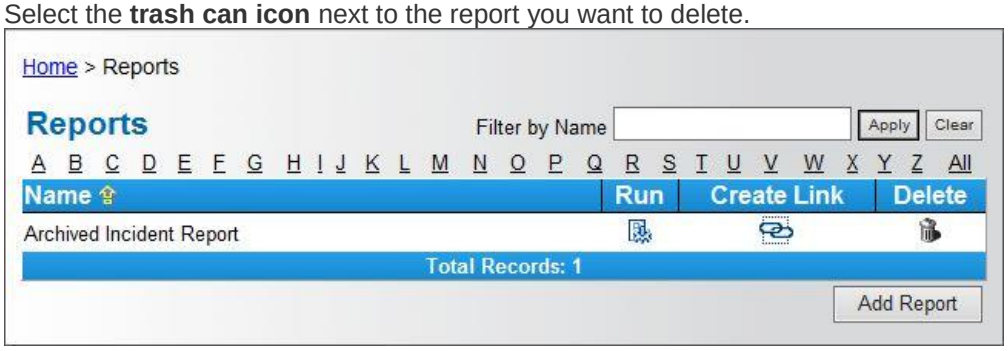
Deleting a Board Report

To delete a board report, you must delete the report in the *Reporter* manager and delete the link to that report in the *Links* manager.

To delete a board report, follow the steps below.

1. Select the **Reporter** link in the *Incidents* section of the admin window.

2. Select the **trash can icon** next to the report you want to delete.



3. When the delete confirmation dialog box appears, select the **OK** button to delete the report, or select the **Cancel** button to abort the operation.

Note: After you have deleted a report in the Reporter manager, you must delete the report from the Links manager. See the Process topic for detailed instructions on deleting links.

The Simulator Manager

Simulator is a tool organizations can use for initial and recurring training, drills, and exercises. Simulator allows you to construct scenarios that can be added to WebEOC and run as needed in support of training or exercises. It can simulate inputs that would (in an actual incident) be generated by an entire team of emergency responders, while minimizing (during exercises) the number of support personnel needed for role-play activities.

With Simulator, authorized users can:

- Develop system-generated inputs that are automatically injected at specified intervals based on ETime;
- Develop contingency inputs for which ETimes cannot be determined, but may be input later as exercise play unfolds;
- Modify scenario inputs (if the edit occurs before the item appearing on the designated status board);
- Disable an entry from being posted;
- Delay inject of a scheduled entry;
- Selectively remove entries already posted to status boards;
- Pause the simulation if a drill is temporarily suspended and restart when the drill resumes;

- Import and/or export simulation data in XML-formatted text files;
- Generate hardcopies of the timeline and injects; and
- Archive the incident intact with entries posted by the Simulator; as well as those added by players.

A unique feature in WebEOC is the ability to create a simulation from an archived incident, i.e., turning archived board data into a simulation. This feature, executed through the Archives manager, provides the following significant capabilities.

- Through the Simulator manager, an archived incident can be reviewed as though it were occurring in real-time, an invaluable tool that can aid in post-critique and evaluation activities.
- An archive that has already been created as a simulation can be edited and run using the Simulator manager for training and drill purposes.

After creating a simulation of an archived incident, archived board data is automatically imported and added to the list of simulations. The newly created simulation will reflect the archived name and will have (Imported) added to the end of the name (i.e., Process Facility Security Breach (Imported)).

Note: When sharing simulations with other WebEOC agencies or when an archive has been turned into a simulation, it is possible that boards and field data may not import intact. This will occur if a board has been deleted from or does not exist in the system or when field names in a board have been changed or deleted.

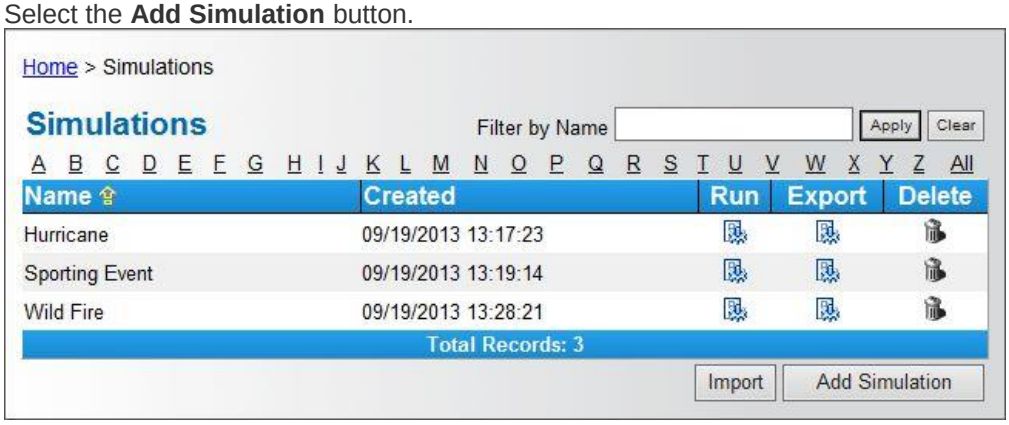
ETimes are calculated based on the elapsed Simulator run-time. ETimes are calculated and entered to the Simulations manager in hours, minutes, and seconds. Before creating a simulation, users may want to draft board entries or inject numbers and ETimes to be used in the scenario. If developed in an external application, scenario designers can cut-and-paste entry details from the external file while editing the simulation.

Adding a Simulation

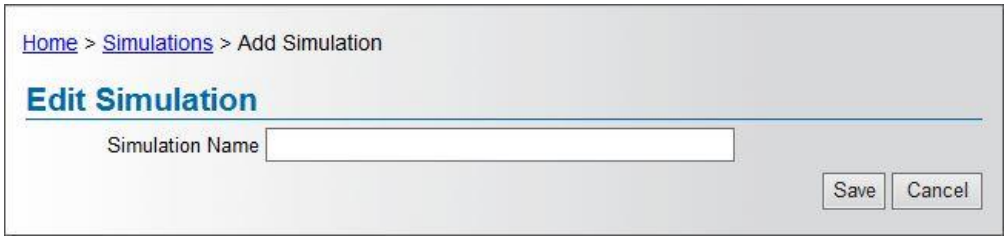
To add a new simulation, follow the steps below.

1. Select the **Simulator** link in the *Incidents* section of the admin window.

2. Select the **Add Simulation** button.

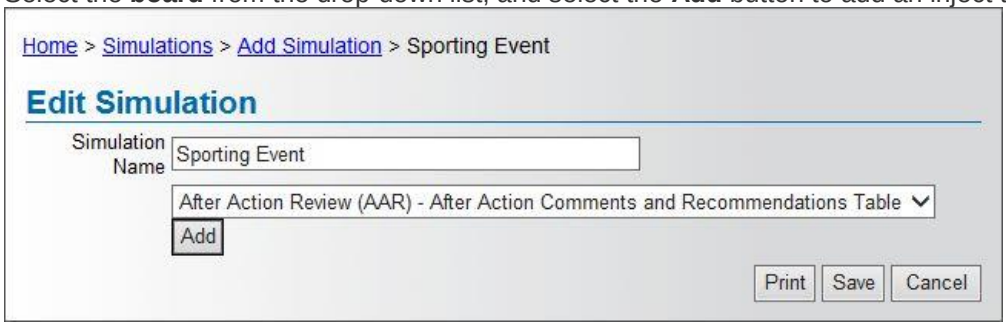


3. Enter a **name** for the simulation in the *Simulation Name* field.

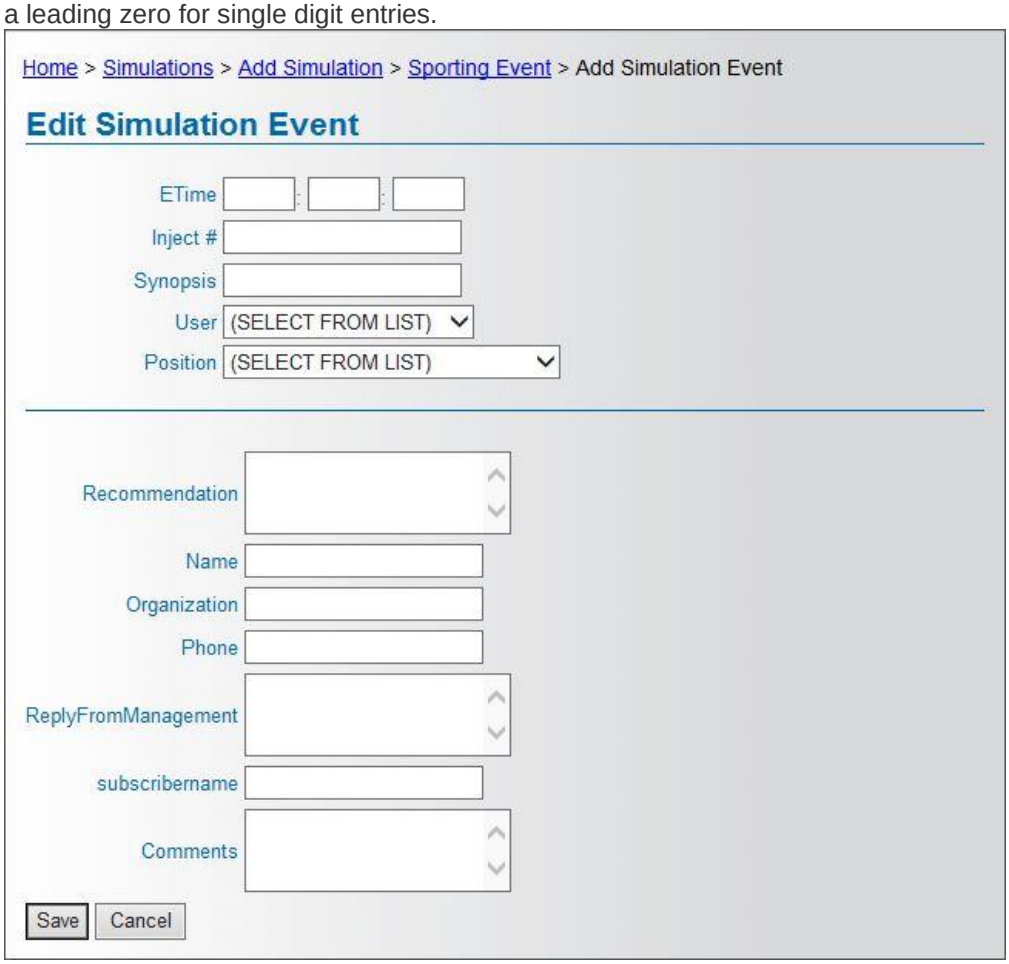


4. Select the **Save** button to save the new simulation, or select the **Cancel** button to abort the operation.

5. Select the **board** from the drop-down list, and select the **Add** button to add an inject to that board.



6. Enter the **ETime** using the format hh:mm:ss (for example, 01:15:30) or, if the entry is to be manually injected at an indeterminate time, maintain the default ETime of 00:00:00. It is not necessary to enter a leading zero for single digit entries.



Note: The ETime is the amount of time that will lapse from the Simulator start time, to the time the entry will be auto-posted to the status board. When the ETime for the entry is reached, Simulator will post the entry and the current date and time will appear on the board.

7. Enter an **Inject #** (identifier), if applicable.

8. If desired, enter a **short summary** in the *Synopsis* field. This synopsis, in conjunction with an Inject # (if applicable), is displayed in the *Events* list in both the *Edit Simulation* window and *Simulation Run* window. These two pieces of information can help locate a specific entry easily in the *Simulation Run* window.

9. Select the **user** and **position** from the drop-down lists.

10. Some boards contain date and time fields. These field will have [Offset Days] or [Offset Hours] next to them. If the board you are configuring does not include an offset day or time, skip to step

Simulated entries can display either the actual date and time posted or, if different, an “offset” date and time may be configured for the entry.

To specify the actual post date and time, leave the date and time fields blank. When the ETime for the entry is reached, *Simulator* will post the entry and the current date and time will appear on the board. For example, if an entry is added to a simulation with an ETime of 00:15:00 (15 minutes) and the date and time fields remain blank, Simulator is started at 10:00 hours on 05/12/07. At E+15 minutes (i.e., 15 minutes has elapsed), the entry is posted to the board with a post date of 05/12/2007 and post time of 10:15.

Entries whose date and time are not the same as the current date and time are configured with an “offset” value in plus (+) or minus (-) days and/or minutes. These values are added to or subtracted from the calculated ETime. For example, a simulated entry will post at E + 2 hours (02:00:00) but the time displayed on the board should reflect an entry time of one hour (60 minutes) earlier than the current time.

When configuring this entry, an ETime of 02:00:00 (two hours) is entered. To offset the date and time, leave the date blank (the current date will be used) and set the time at -60 minutes.

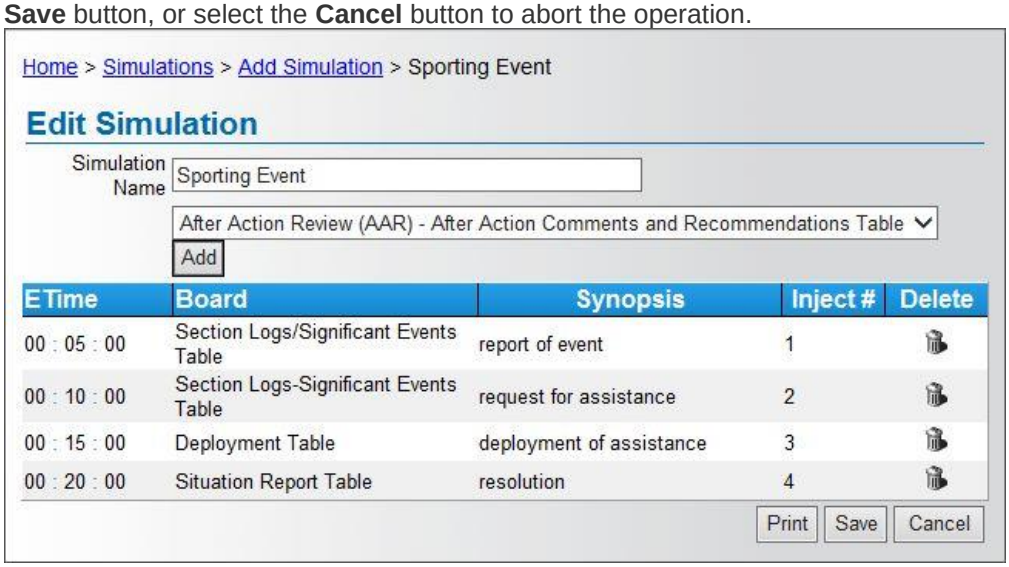
Simulator is started at 09:32 on 5/12/2004. When the ETime 02:00:00 is reached (at 11:32), the entry is posted to the designated board with a date of 05/12/2009 (the current date) and a time of 10:32 (11:32 current time minus 60 minutes offset time).

Offset days and minutes can be entered as positive or negative values and are added to or subtracted from the post date and time.

11. Complete the remaining data fields in the *Edit Simulation Event* window as applicable. Since each board contains a unique set of data field, the list of data fields will vary.

12. After you have completed all applicable fields, select the **Save** button to save the board to the simulation, or select the **Cancel** button to abort the operation. For each additional inject to your simulation, you must repeat steps 5 through 12.

13. After you have added all of the injects to the boards selected for your simulation, select the **Save** button, or select the **Cancel** button to abort the operation.

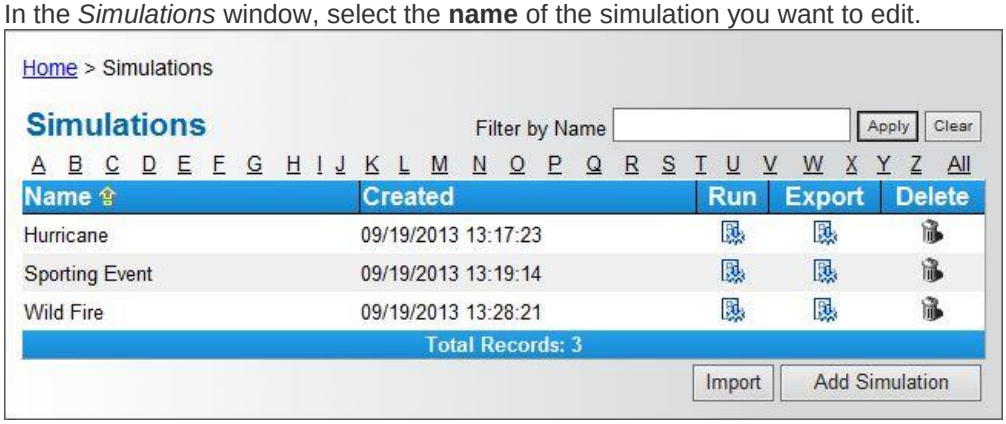


Editing an Existing Simulation

To edit an existing simulation, follow the steps below.

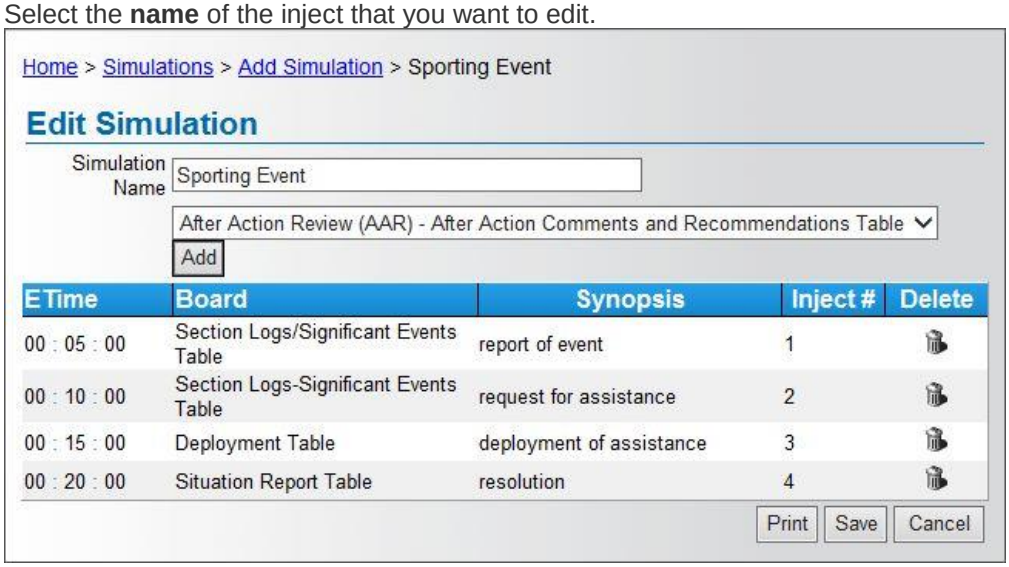
1. Select the **Simulator** link in the *Incidents* section of the admin window.

2. In the *Simulations* window, select the **name** of the simulation you want to edit.

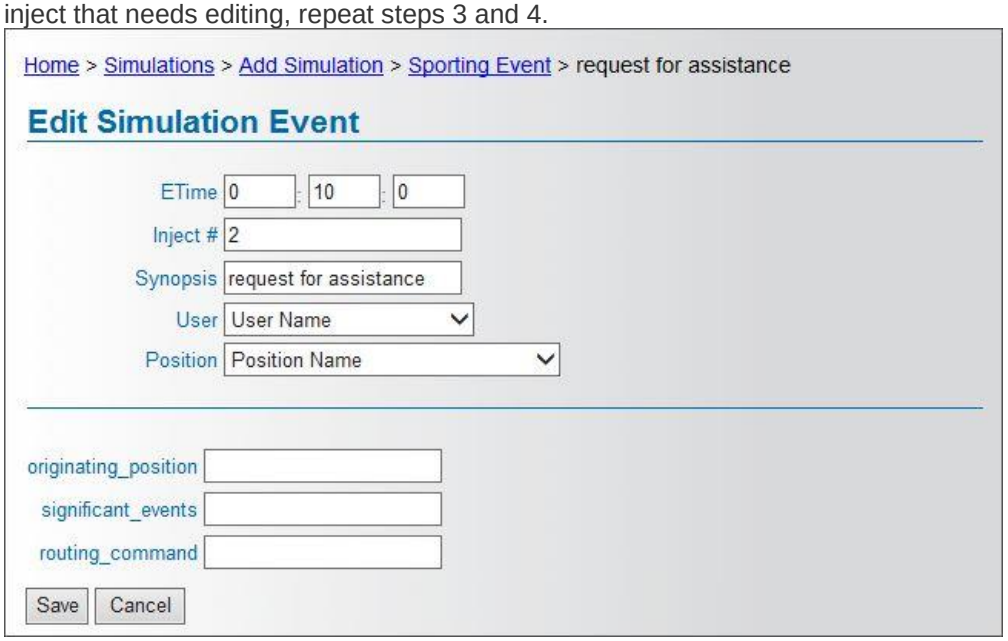


Note: If you are editing an archived simulation that has been created, empty data fields indicate changes have been made to the board since the incident was archived.

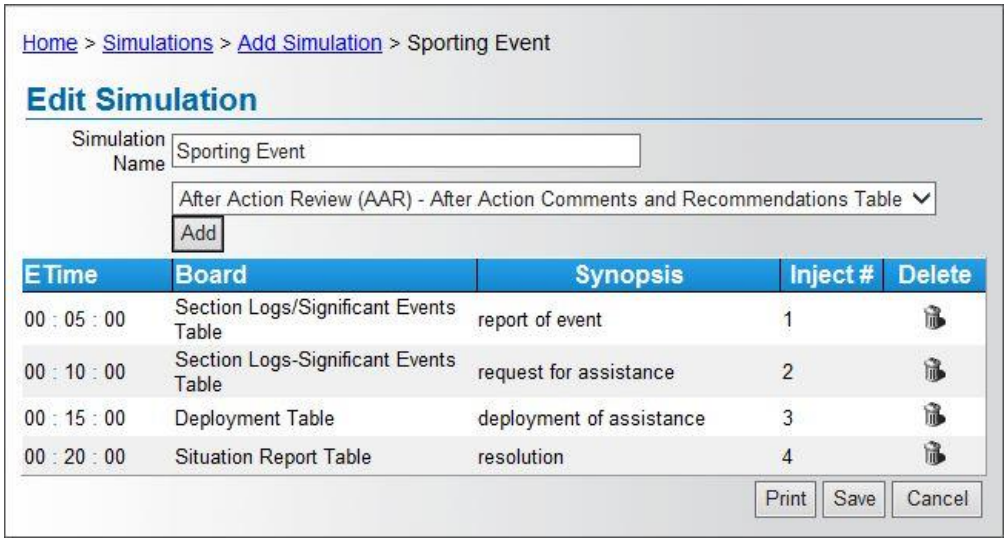
3. In the *Edit Simulation* window all the injects for each board are listed according to the latest Etime. Select the **name** of the inject that you want to edit.



4. In the *Edit Simulation Event* window, edit the data fields that need to be revised, and select the **Save** button to continue, or select the **Cancel** button to abort the operation. For each subsequent inject that needs editing, repeat steps 3 and 4.



5. To add more injects to your simulation, select the **board** from the drop-down list and select the **Add** button.



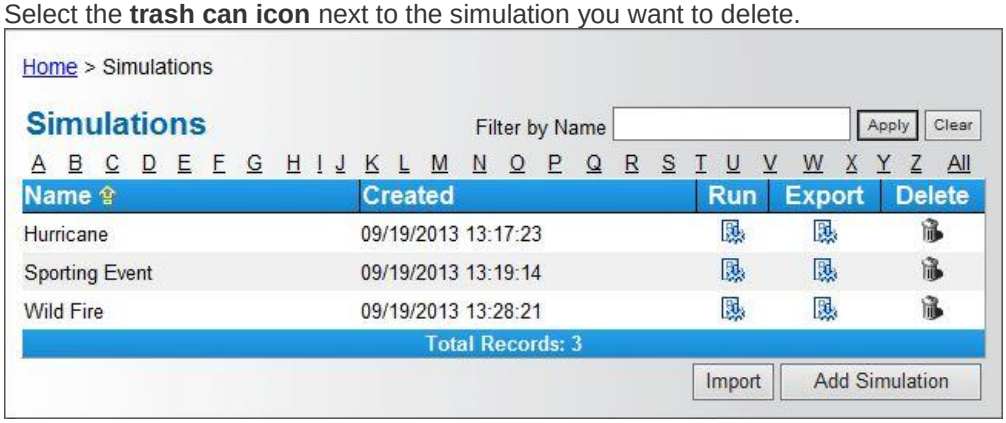
6. In the *Edit Simulation Event* window, enter the **data** in the appropriate fields, and select the **Save** button to save your changes, or select the **Cancel** button to abort the operation.

Deleting a Simulation

To delete a simulation, follow the steps below.

1. Select the **Simulator** link in the *Incidents* section of the admin window.

2. Select the **trash can icon** next to the simulation you want to delete.



3. When the delete confirmation dialog box appears, select the **OK** button to delete the selected simulation, or select the **Cancel** button to abort the operation.

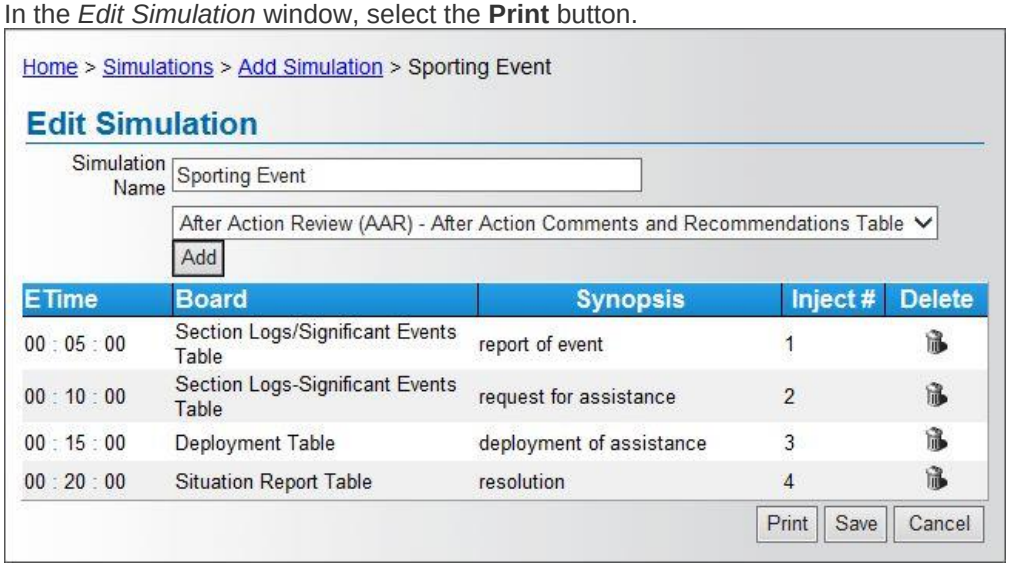
Printing a Simulation

To print a simulation, follow the steps below.

1. Select the **Simulator** link in the *Incidents* section of the admin window.

2. In the *Simulations* window, select the **name** of the simulation you want to print.

3. In the *Edit Simulation* window, select the **Print** button.



4. The simulation details will appear in a new window. Right-click in the window, and use your browser options to print the simulation.

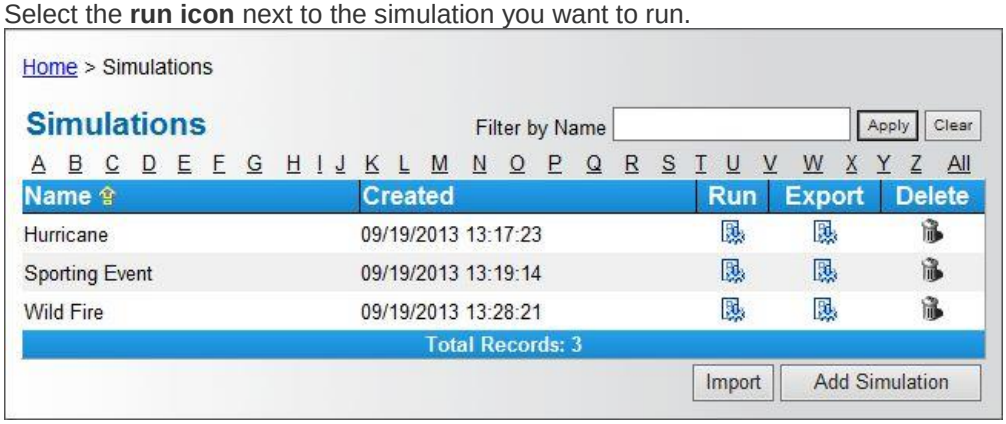
Running a Simulation

You cannot use the “Setup” incident to run a simulation. Log in to an incident created for the drill or exercise before starting *Simulator*. Users, groups, and positions are assigned as with an actual incident.

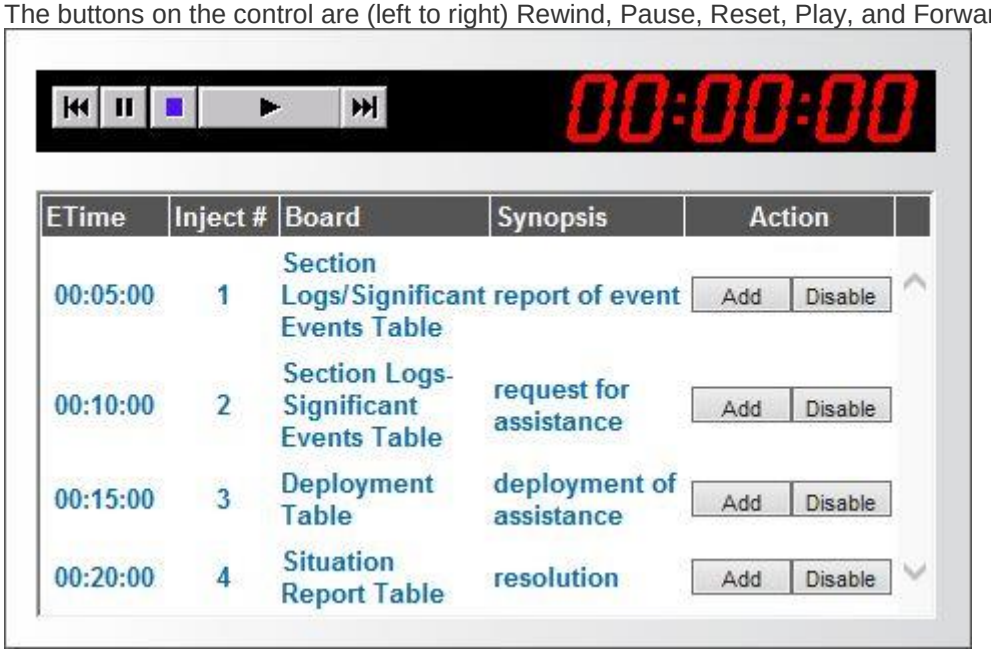
To run a simulation, follow the steps below.

1. Select the **Simulator** link in the *Incidents* section of the admin window.

2. Select the **run icon** next to the simulation you want to run.



The control window uses DVD-like controls complete with buttons and digital elapsed time display. The buttons on the control are (left to right) Rewind, Pause, Reset, Play, and Forward.



- The Rewind button sets the Simulator clock back to one second before the last ETime and removes the entries matching that ETime from the related boards.

- The Pause button stops the clock without setting it to zero.

- The Reset button stops the simulation, resets the clock to 00:00:00, and removes all entries that have been posted up to that point.
- When Reset is selected, the Reset the Simulation window will appear advising the user that this feature will remove all posted entries from status boards. Select the OK button to reset the clock and remove posted entries, or select the Cancel button to abort the operation.

Note: Entries with 00:00:00 ETimes that were manually injected must be individually removed by selecting the Enable button.

- The Play button starts the clock.
- The Fast Forward button advances the clock to the next scheduled ETime and posts the entry or entries configured with the specified ETime.
- Configured entries for the simulation are displayed in the list box and are ordered by ETime.
- Entries with ETimes of 00:00:00 do not auto-post to their respective boards. The administrator running the simulator must manually inject these entries by selecting the Add button next to them.

Note: Contingency messages and injects with indeterminate post times are excellent candidates for 00:00:00 ETime configuration.

- Each line entry displays the ETime, Inject #, Board name, Synopsis, and two action buttons with the default settings of Add (or Remove) and Disable (or Enable).
- Button settings associated with each entry line indicate the operation that will be applied to the entry when the button is next selected. As button settings are changed, the entry status and display color (white, blue, or red) corresponding to that entry change. If the Add and Disable buttons are available, the entry may be injected (either manually or automatically) or disabled (unavailable for posting). When the Add button is selected or the entry is automatically posted, the Remove button is made available and the Disable button is made unavailable. When the Disable button is selected, the Enable button is made available and the Add button is made unavailable.
- When the simulation is initially loaded, all line entries are displayed in white with default button settings of Add and Disable, indicating they are available for posting (i.e., have not been injected). As the simulator runs and ETimes are reached or as entries are manually injected, individual entry lines change colors and the associated buttons change, indicating actions that can be taken.

- Before posting to a status board, users can modify associated details through the Edit Simulation window. After a post has been uploaded to its status board, entry updates can only be accomplished through the input view.
- For the user, entries can be added, updated, sorted, and filtered as any other entry.
- Do not data-link entries posted through the Simulator manager. This can cause unpredictable results when posts are removed from a board.
- The simulation will automatically pause once all non-zero ETimes for the simulation have occurred.
- At the conclusion of the simulation, event information can be archived intact with all injects as well as entries posted by players, or deleted per your organization's policies and procedures.

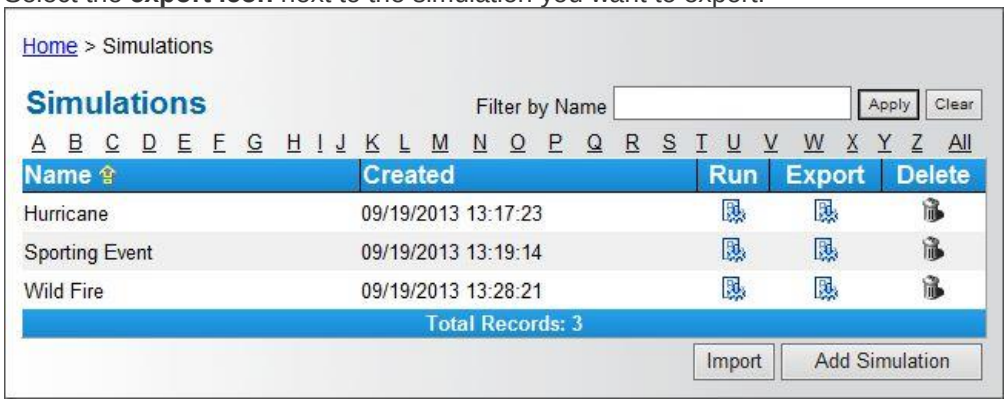
Note: To save all the posted entries with the injects, close the Simulation Run window by clicking the red X in the upper right hand corner. Do not use the control reset button. The reset button will remove all the posted entries from the status boards.

Exporting a Simulation

You can export a simulation and share it with other agencies.

To export a simulation, follow the steps below.

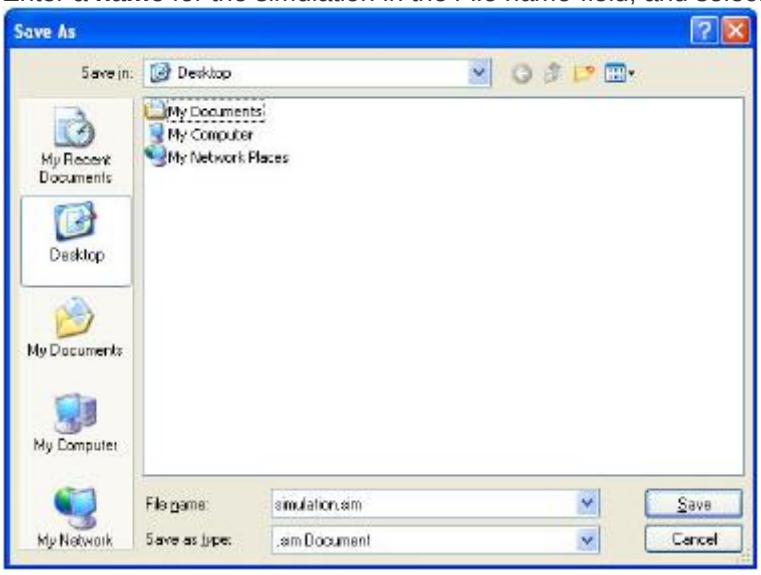
1. Select the **Simulator** link in the *Incidents* section of the admin window.
2. Select the **export icon** next to the simulation you want to export.



3. Select the **Save** button to save the simulation file to your computer, or select the **Cancel** button to abort the operation.

File Download
Do you want to open or save this file?
Name: list.csv
Type: Microsoft Office Excel Comma Separated Values Fil...
From:
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

4. Enter a **name** for the simulation in the *File name* field, and select the **Save** button.



5. When the *Download Complete* window appears, select the **Close** button.

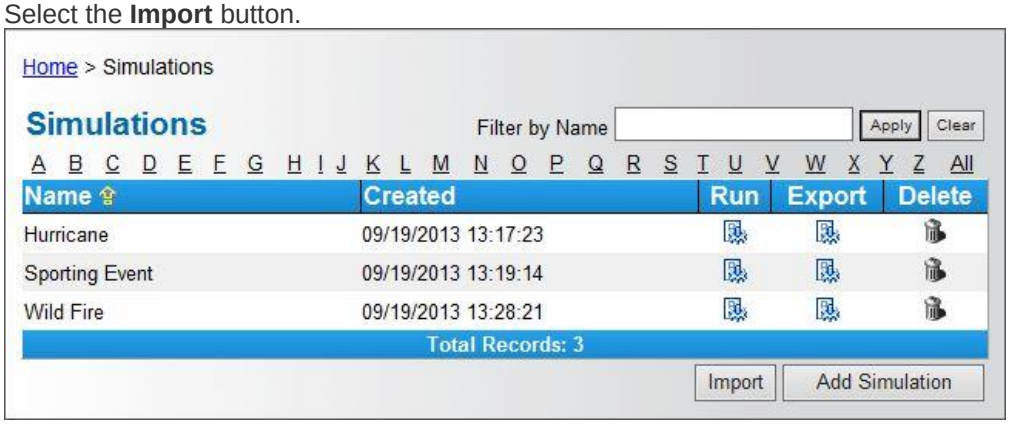
Importing a Simulation

When sharing simulations among WebEOC agencies, it is possible that boards and field data may not import intact. This could occur if the board does not exist in your system, or if the imported board data fields are not the same as the board in your system.

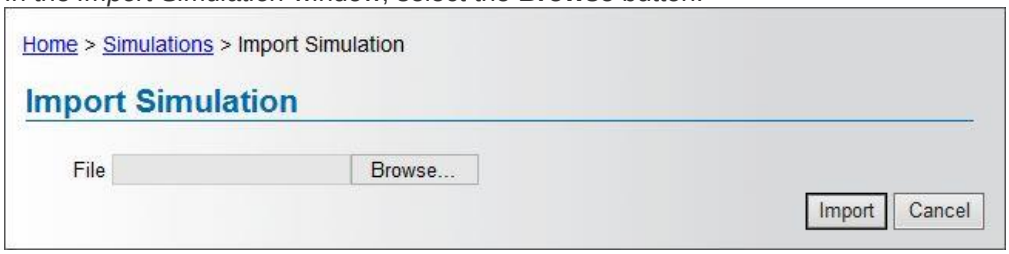
To import a simulation, follow the steps below.

1. Select the **Simulator** link in the *Incidents* section of the admin window.

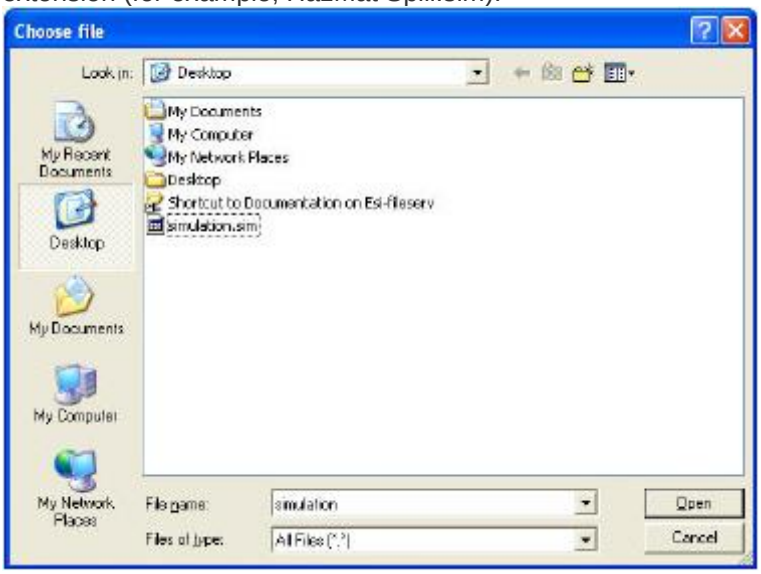
2. Select the **Import** button.



3. In the *Import Simulation* window, select the **Browse** button.



4. Select the **file** you want to upload, and select the **Open** button. The file should have a .sim file extension (for example, HazMat Spill.sim).



5. Select the **Import** button to upload the file to the *Simulations* window. The simulation and the date and time it was imported is added to the list and appended with (Imported).

Processes

The Agency Template Manager

The Agency Template manager allows you to define a default template for your boards and WebEOC. You can apply your agency's name, logo, and color and font scheme to boards. You can also add a login policy message that will appear on every user's login window.

Agency Template is divided into three sections: agency name and logo; policy information and activation messages; and colors and fonts schemes.

When exporting boards that use your agency template, the theme is not exported.

Adding an Agency Template

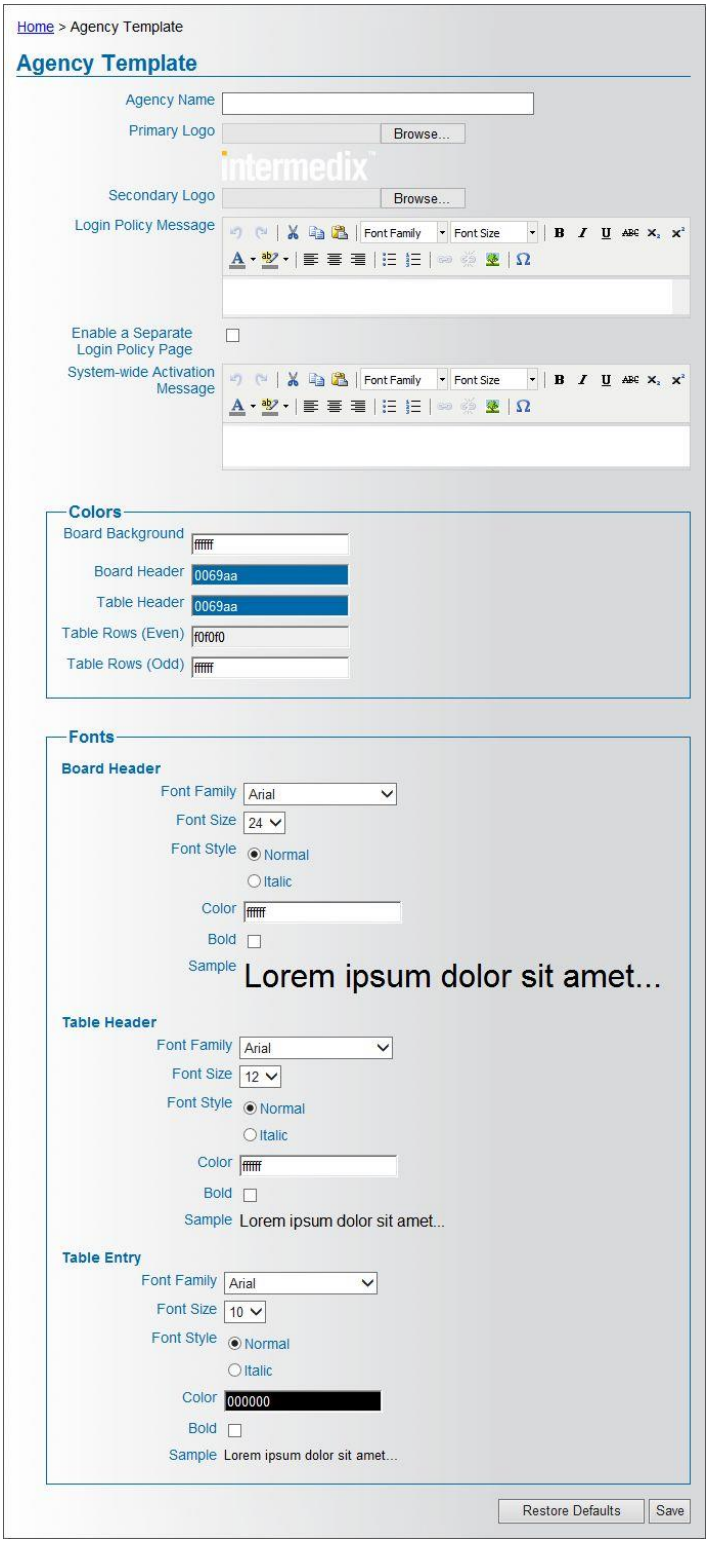
To add an agency template, follow the steps below.

1. Select the Agency Template link in the Process section of the Admin window.

2. In the Agency Template window, enter a name in the Agency Name field. Your agency's name is displayed in boards and is applied using the <agencyinfo /> tag. If you do not apply the tag, attribute, and value to your board, your agency's name will not appear in the board. See the HTML Conventions topic for detailed instructions.

3. Select the **Browse** button next to the *Primary Logo* field to upload your agency's logo. The current default logo appears under the Primary Logo field. This logo is displayed in boards and is applied to a board using the <agencyinfo /> tag. If you do not apply the tag, attribute, and value to your board, your logo will not appear. See the HTML Conventions topic for detailed instructions.

4. Select the **Browse** button next to the *Secondary Logo* field to upload an additional logo. This logo is displayed in boards and is applied to a board using the <agencyinfo /> tag. If you do not apply the tag, attribute, and value to your board, your logo will not appear. See the HTML Conventions topic for detailed instructions.



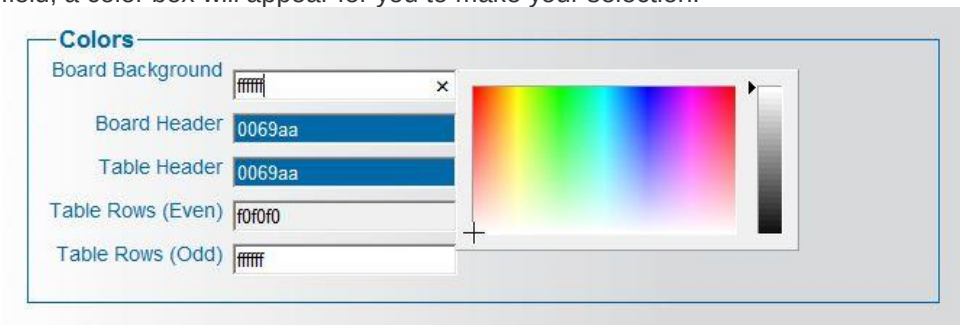
5. In the *Login Policy Message* field, enter your agency's login policy message. Any text entered in this field will appear on the WebEOC Login window. Text can be copied from a Microsoft Word document into this field. Formatting is retained.

6. If you want the login policy message to appear on a separate page, select the **Enable a Separate Login Policy Page** check box. This will create a separate page during login with an Accept button. Users must select the Accept button in order to continue logging in to WebEOC. This is useful if your agency has a policy change that needs to be communicated to staff. Below is an example of what this feature looks like during the login process.

WebEOC 7.5 Login
intermedix
This is an example of the separate login policy window. Text for this area is configured in the Agency Template manager.
Accept

7. In the System-wide Activation Message field, enter text indicating the status of your EOC. This message is displayed in boards and is applied to a board using the <agencyinfo/> tag. If you do not apply the tag, attribute, and value to your board, the activation message will not appear. See the HTML Conventions topic for detailed instructions.

8. In the Colors section, assign a color to the background of your boards, board headers, table headers, and table rows by entering a color code or selecting inside the field. When you select a field, a color box will appear for you to make your selection.



9. In the Fonts sections, select a font family, font size, font style, and font color for the Board Header, Table Header, and Table Entry sections. When you alter the default settings, your settings will change the Sample text.

10. Select the **Save** button to save the agency template, or select the **Restore Defaults** button to abort the operation.

The Boards Manager

A status board is a display used to transmit and share crisis information in real time. Although pre-built status boards are included in WebEOC, the Boards manager allows you to create status boards, modify status boards, or delete boards that are no longer needed. After a board has been developed, specialized options and functions can be assigned or modified using the Advanced Board Editor. This section will give you an overview of board building and the basic anatomy of a board.

Because board building is a lengthy process, an entire topic has been dedicated to it. See the Basic Board Building topic for detailed instructions on building a board.

Planning a Status Board

Before building a status board in WebEOC, sketch a design of the layout on paper or a whiteboard. Consider the following points before creating or modifying a board.

- What's the purpose of the board?
- What should be the name of the board?
- What type of board (standard, tasking, resource tracking, etc.) am I creating?
- What information will be recorded on the board?
- What fields will be needed to capture data? What should I name and label the fields? What types of field will I need (i.e., system field or custom field, text, drop-down list, etc.)? Are any of the fields required to be completed before posting a record to its status board? If so, which ones?

Note: Labels may be unnecessary where the field is obvious such as date, time, source, etc. Labels take up space on the display that could be used more efficiently for data display.

- If a list is necessary, does it currently exist? If not, the list must be built.
- Is a header row or a footer row required?
- Is the board "add only," or will users be allowed to update?
- Will the board be Dual Commit enabled? If so, will entries be dual-committed automatically or manually?
- What options will be applicable to this board?
- Will user input and/or viewing privileges be restricted?

- Will filters be helpful with viewing restrictions?
- Will information posted to this board be data-linked to other boards? If so, which fields will be linked and to which boards and fields will this data be linked?

After requirements for the board have been identified, you should be ready to begin building the board.

About Views

In WebEOC, users enter information that is viewed in a pre-defined format. Users input information through a data entry window. The resulting output is displayed in a status board.

In the Boards manager, the terms “input view” and “display view” simply mean, in user terms, the data entry window (input view) and status board (display view). Editing tools to design input and display views are available through the Board Wizard and the Advanced Board Editor.

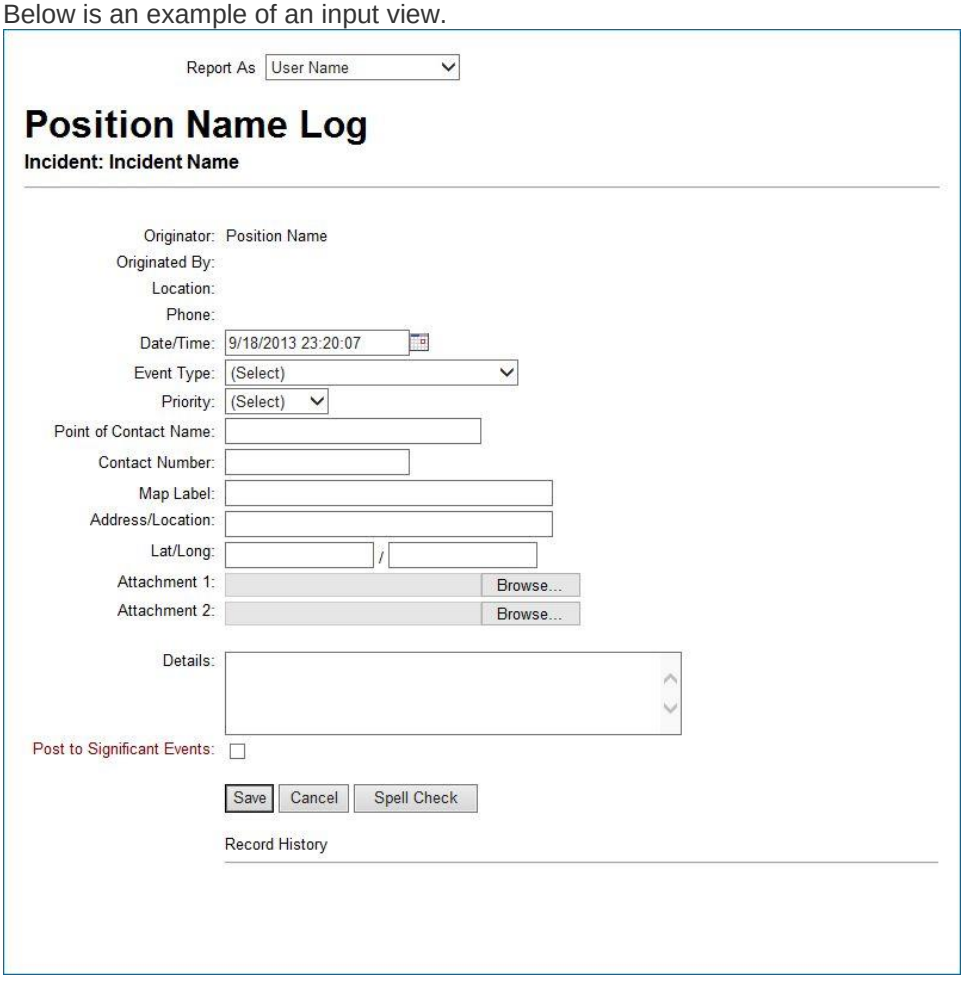
The ability to create multiple input and display views allows an organization to record sensitive information while at the same time restricting unauthorized access. For example, during design, the input view for a Victims status board includes a field to record victim names. Two display views are added: one view is intended for hospital use only and includes victim names, and a second display view used by media personnel hides the sensitive information. The display view that includes victim names would be assigned to a Hospital group, while the view that excludes victim names would be assigned to a Media group, ensuring sensitive information is restricted on a need-to-know basis.

WebEOC allows you to create boards that have single or multiple input and display views based on a single table or multiple tables. These tables correspond to a table in the underlying SQL Server database. This allows an agency to record and filter sensitive information while at the same time restrict unauthorized access. It also provides an easy method of implementing processes through WebEOC.

You must use the Advanced Board Editor to edit boards that have multiple input or display views.

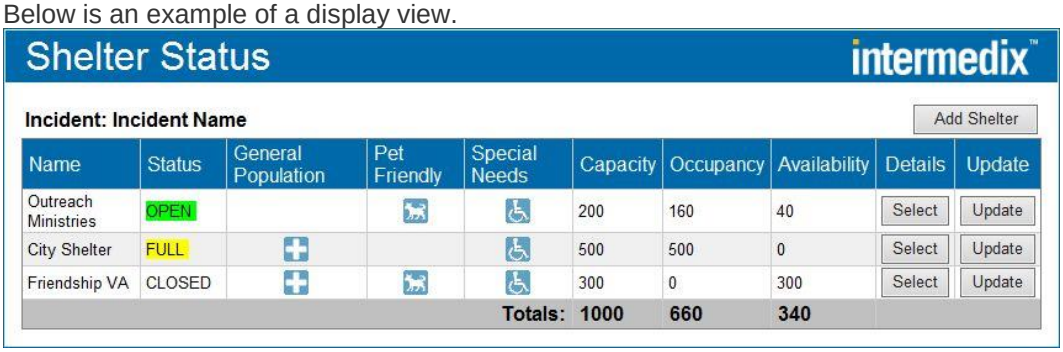
Input View

Below is an example of an input view.



Display View

Below is an example of a display view.


Shelter Status
intermedix
Incident: Incident Name
Add Shelter
Name Status General Population Pet Friendly Special Needs Capacity Occupancy Availability Details Update
Outreach Ministries OPEN 200 160 40 Select Update
City Shelter FULL 500 500 0 Select Update
Friendship VA CLOSED 300 0 300 Select Update
Totals: 1000 660 340

Edit Board Overview

Include

The Include section provides a list of plug-ins or interfaces installed on the WebEOC server that can be integrated into a status board by incorporating specialized fields into the design of the board. Refer to the plug-in or interface documentation for detailed instructions to implement the specialized functionality.

Plugins

The Plugins section provides a list of WebEOC plug-ins that allows you to build boards that integrate with the plug-in fields and data. Refer to the board/plug-in integration guide for the specific plug-in for detailed instructions to integrate plug-in data with a board.

Tools

Board Wizard

You can use the Board Wizard to build and edit basic boards that have a single input view and a single display view. To extend the functionality of a board created using Board Wizard, you will need to utilize advanced board editing tools.

The Board Wizard button will not be available (grayed-out) if the board has multiple input or multiple display views. In this instance, you will need to use the Advanced Board Editor.

Advanced Board Editor

The Advanced Board Editor provides all the tools needed for creating and editing input and display views, and adding enhanced functionality to a status board. The Advanced Board Editor also allows a WebEOC administrator to directly edit the HTML for a board.

Edit Data Links

Data can be pushed from one status board to other boards by establishing data links and properly mapping the fields (from and to) that will be used to push information in WebEOC. One-way and two-way data linking can be established.

Import/Export Board

You can add new boards to WebEOC, or export board files for sharing, using the Import/Export Board feature.

Import/Export Data

You can import and export board data using the Import/Export Data function.

Individual Board Assignment Report

The Individual Board Assignment report contains data for a specific board. The report opens in PDF format in a new window. You can save or print the PDF file. Only users with access to the Boards manager can access the individual board report. See the Viewing the Individual Board Assignment Report topic in this section for additional information.

Manage Resources

The Manage Resources feature allows you to upload static files that can be referenced within status boards. Those files are exported and imported with the board.

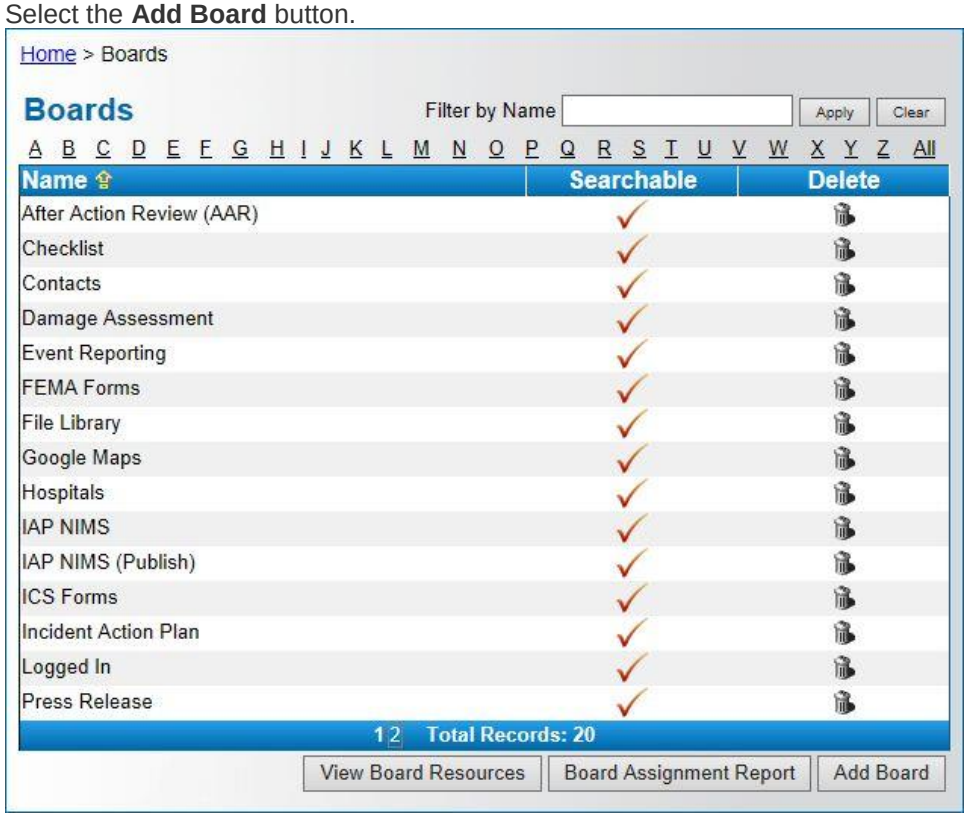
For example, if you have a logo or custom field in your board, those files can be stored here. When you export a board to share it, the logo and custom field is exported with the board file.

Adding a New Board

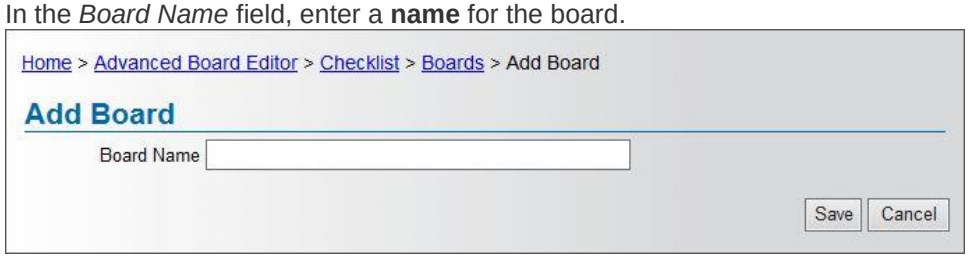
To add a board, follow the steps below.

1. Select the **Boards** link in the *Process* section of the admin window.

2. Select the **Add Board** button.



3. In the *Board Name* field, enter a **name** for the board.



4. Select the **Save** button to add this board, or select the **Cancel** button to abort the operation.

   When *Save* is selected, the *Edit Board* window will appear.

Note: The next section, Board Edit Window Overview, provides an overview of the features and functions that are available from or accessed through the Board Edit window. When you are ready to add and design new input and display views for your board, proceed to the section Adding an Input View.

Deleting a Board

Before deleting a board, archive any active incidents utilizing the board to ensure existing data is stored in the database. Also, if an archived incident is simulated and the board has since been deleted, archived information residing in the board will not be available in the simulation when it is imported to the Simulator manager.

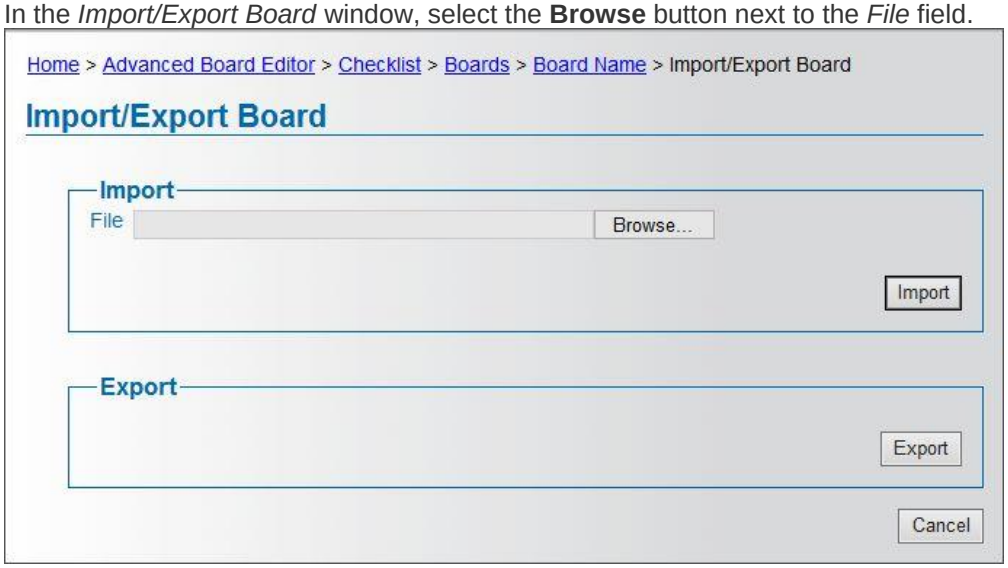
To delete a board, follow the steps below.

1. Select the **Boards** link in the *Process* section of the admin window.
2. In the *Boards* window, select the **trash can icon** next to the board you want to delete.
3. When the delete confirmation box appears, select the **OK** button to permanently delete the board, or select the **Cancel** button to abort the operation.

Importing a Board

To import a board, follow the steps below.

1. Select the **Boards** link in the *Process* section of the admin window.
2. In the *Boards* window, select the **Add Board** button.
3. In the *Add Board* window, enter the **name** of the board in the *Board Name* field.
4. Select the **Save** button to save the board, or select the **Cancel** button to abort the operation. In the *Edit Board* window, select the **Import/Export Board** button.
5. In the *Import/Export Board* window, select the **Browse** button next to the *File* field.

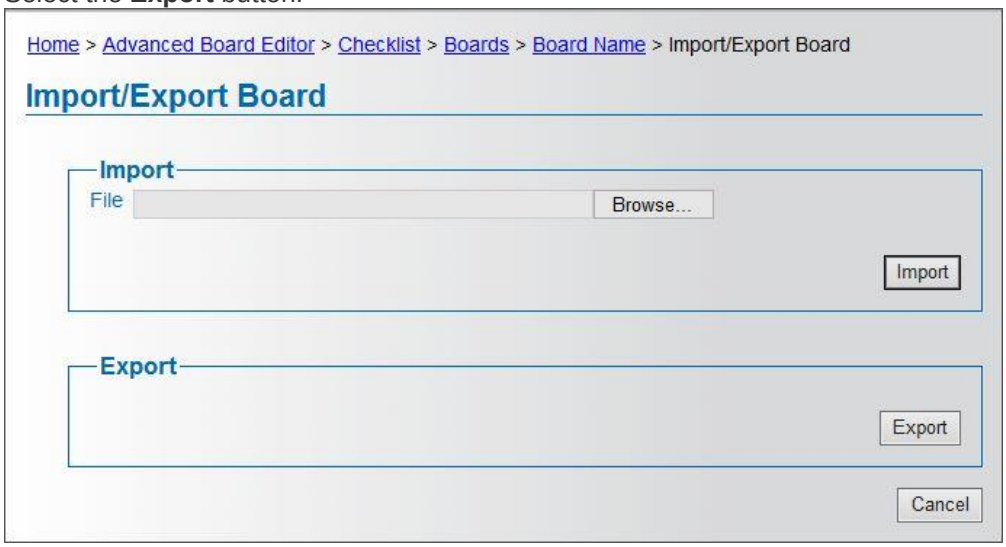


6. Locate the file, select it, and then select the **Open** button.
7. The *File* field will display the path to your file. Select the **Import** button.
8. The *Edit Board* window will reappear. Make any adjustments to the options, and select the **Save** button. The board you just imported will appear in the *Boards* window.

Exporting a Board

To export a board, follow the steps below.

1. Select the **Boards** link in the *Process* section of the admin window.
2. In the *Boards* window, select the **board name** you want to share.
3. In the *Edit Board* window, select the **Import/Export Board** button.
4. Select the **Export** button.



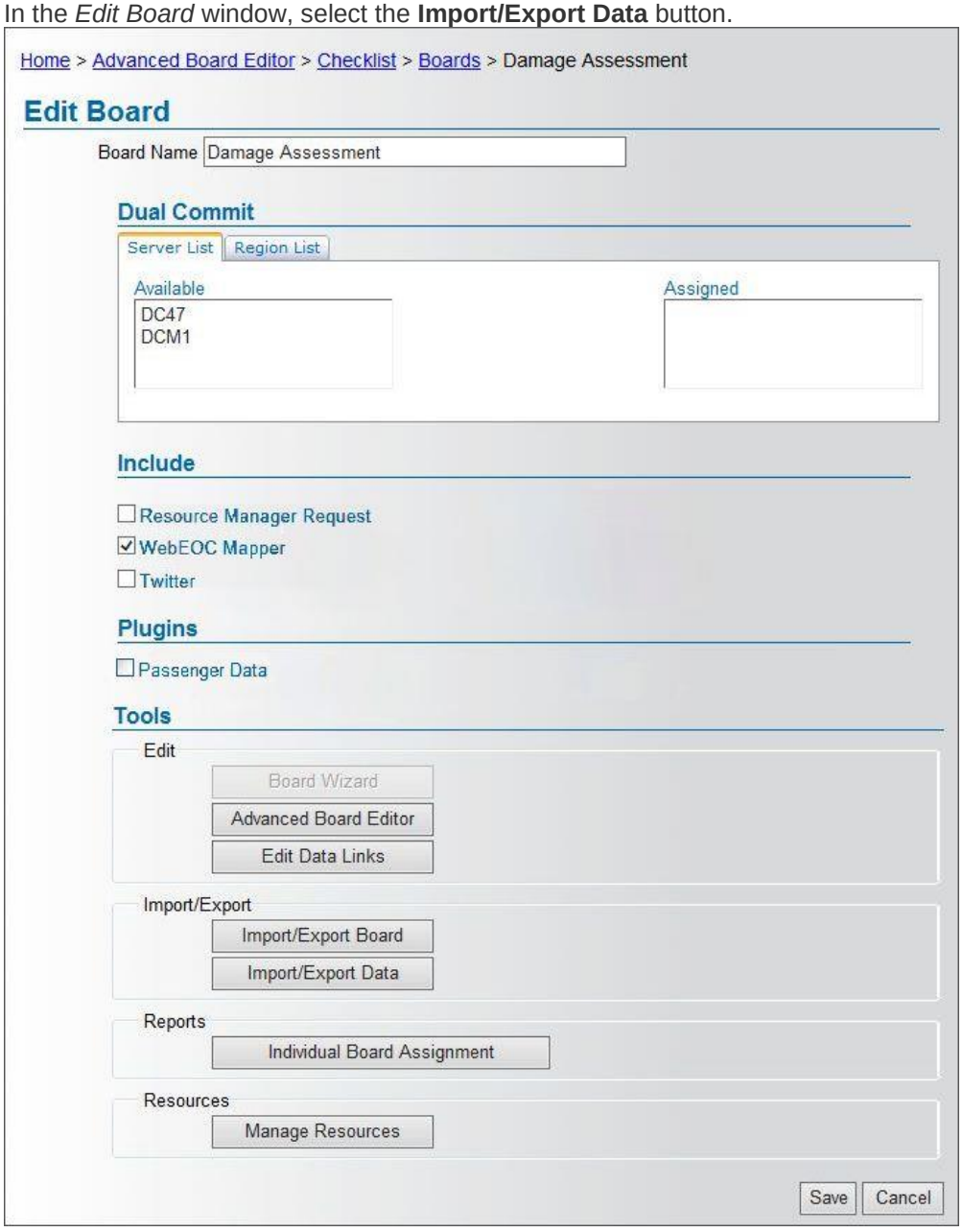
5. Save the board to your computer. When you save the board to your computer, it will appear as a .web file. If you need to open the file, you can use Notepad. The file icon will change to a Notepad icon.

Importing Board Data

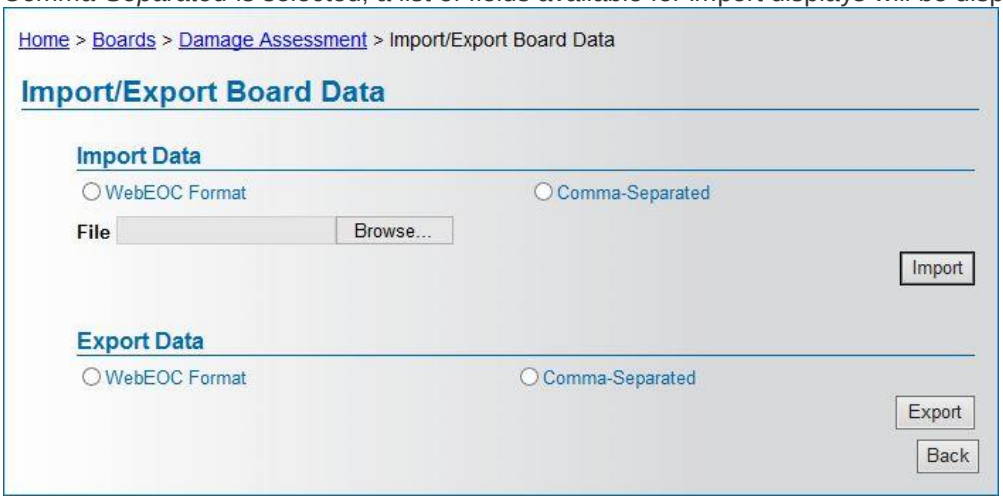
To import board data, follow the steps below:

1. Select the **Boards** link in the *Process* section of the admin window.
2. Select the **name** of the board where you want the data to appear.

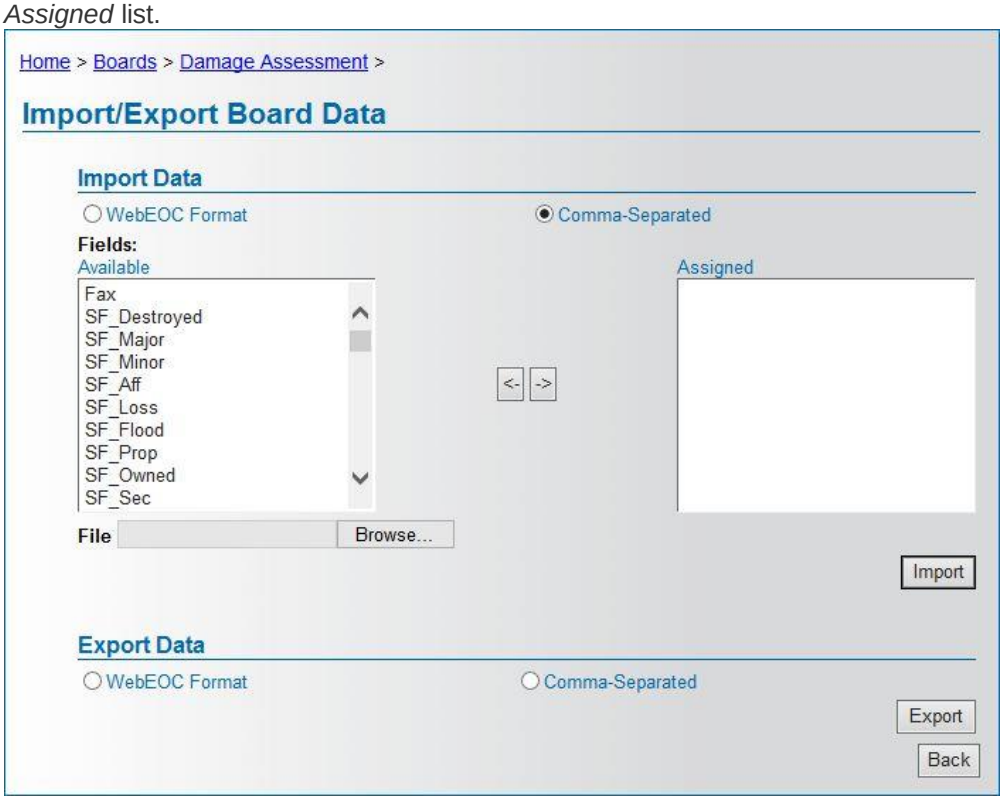
3. In the *Edit Board* window, select the **Import/Export Data** button.



4. In the *Import Data* section, select the **WebEOC Format** or the **Comma-Separated** radio button. If *Comma-Separated* is selected, a list of fields available for import displays will be displayed.



5. From the *Available* list of fields, either highlight the field(s) and select the **right arrow** or double-click each selection in the *Available* list. Selections are removed from the *Available* list and added to the *Assigned* list.



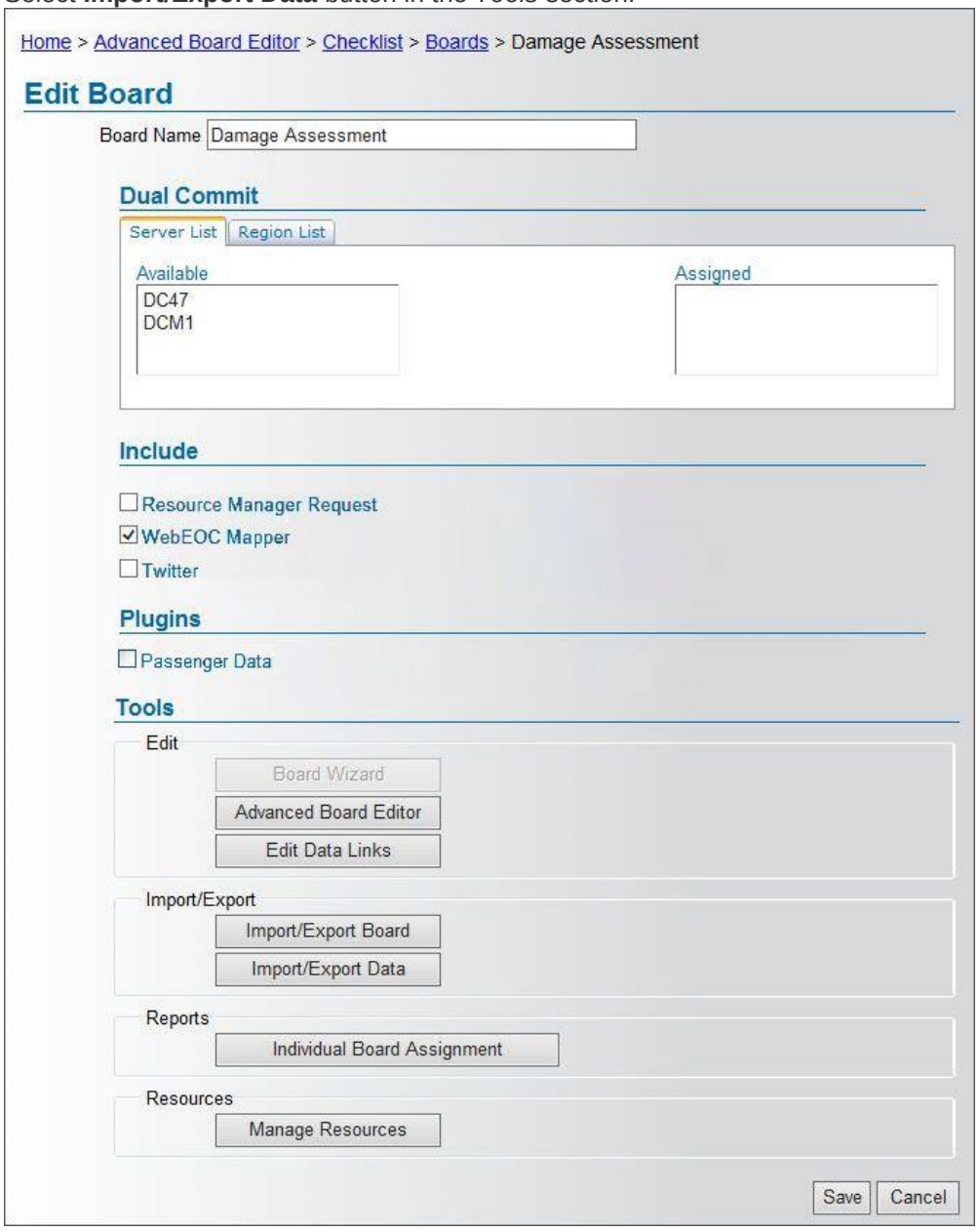
6. To remove a field, highlight the field in the *Assigned* list and select the **left arrow** or double-click each selection. Selections are removed from the *Assigned* list and added to the *Available* list.

7. Select the **Browse** button, locate the board data you want to import, and select the **Import** button.

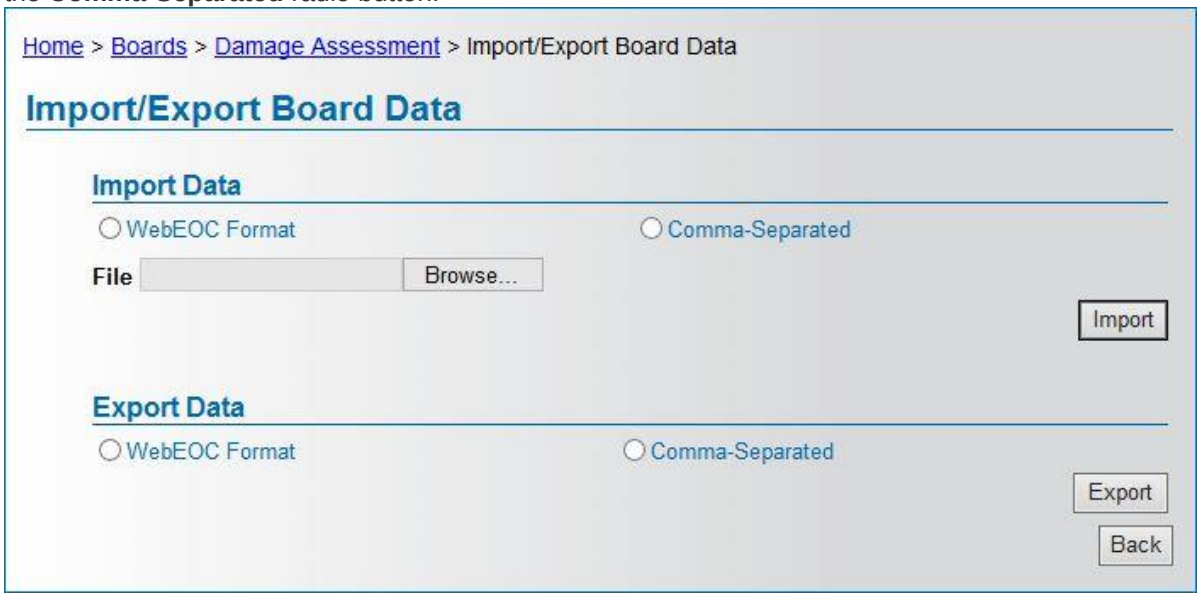
Exporting Board Data

To export board data, follow the steps below:

1. Select the **Boards** link in the *Process* section of the admin window.
2. Select the **board name** you want to export in the *Board* window.
3. Select **Import/Export Data** button in the *Tools* section.



4. In the *Import/Export Board Data* window, under the *Export Data* section, select **WebEOC Format** or the **Comma-Separated** radio button.



5. Select the **Export** button in the *Export Data* section.
6. Select the **Save** button in the *File Download* dialog box to continue.
7. Navigate to the location where the file will be saved, enter a **name** in the *File Name* field, and select the **Save** button.

Sending a Board to the Target Server

In order to share a board with another agency, you must send the board file to them. We recommend creating a ZIP file for the board data and emailing the board. It is necessary to create a ZIP file because some email servers may strip out board code they deem malicious. This will corrupt the board file.

After the agency receives the board, it must be unzipped and then imported on the target server. See the “Importing a Board” section in this chapter for detailed instructions on importing a board.

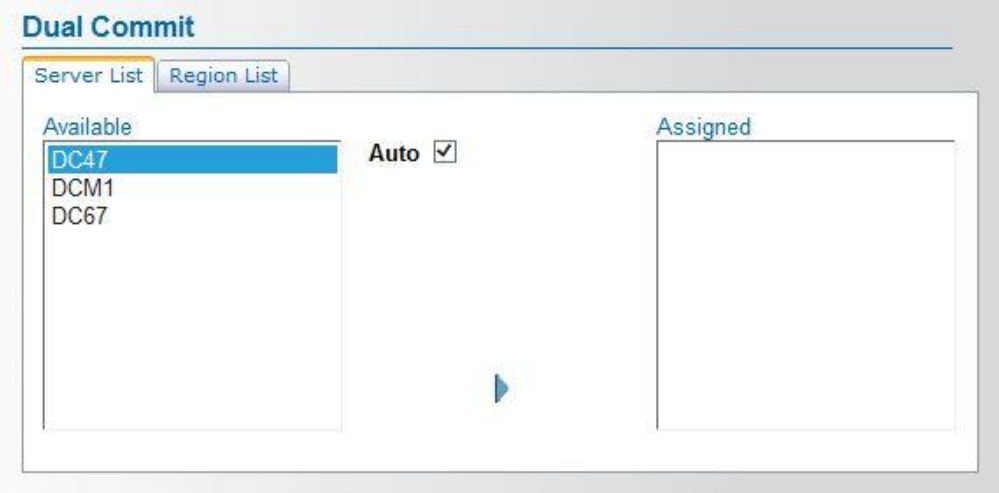
For a Board with Only One Input View

To set a board with only one input view to Dual Commit, follow the steps below.

1. Select the **Boards** link in the *Process* section of the admin window.
2. Select the **name** of the board you want to share.
3. In the *Edit Board* window, select the **Dual Commit servers** from the *Available* list.

Note: The servers listed in the Available box are the host servers. Moving the host server to the Assigned allows the selected board data to be committed to the target server.

4. Select the **Auto** check box if you want all posts to be dual committed by default. Leave this box unselected if you want users to selectively decide which entries to Dual Commit.



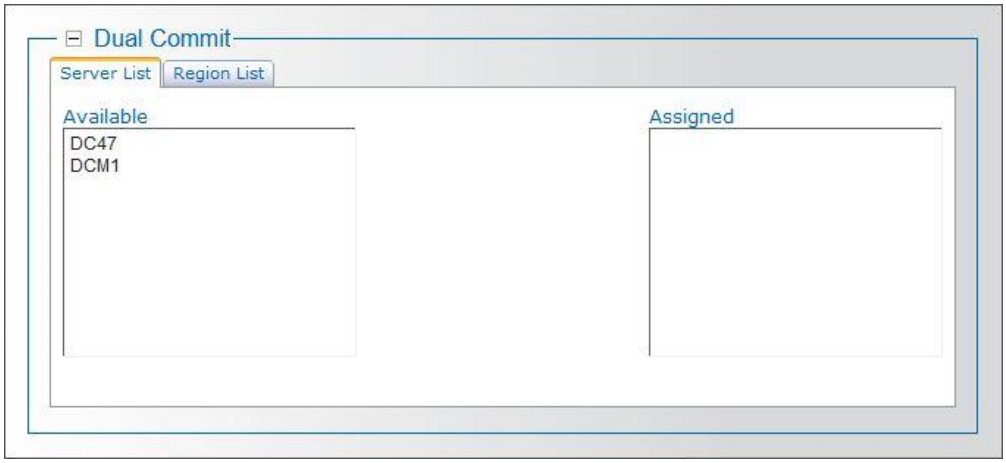
5. Select the **right arrow** to move the server to the *Assigned* list.
6. To add Dual Commit regions to the board, select the **Region List** tab.
7. Select the **region** or **regions** you want to assign from the *Available* list, and select the **right arrow** to move the regions to the *Assigned* list.
8. Select the **Save** button to save the board configurations, or select the **Cancel** button to abort the operation.

For a Board with Multiple Input Views

To set a board with multiple input views to Dual Commit, follow the steps below.

1. Select the **Boards** link in the *Process* section of the admin window.
2. Select the **name** of the board you want to share.
3. Select the **Advanced Board Editor** button.
4. In the *Input View List* section, select the **name** of the input.

5. In the *Edit View* window, select the **Dual Commit servers** from the *Available* list.



6. Select the **Auto** check box if you want all posts to be dual-committed by default. Leave this box unselected if you want users to selectively decide which entries to Dual Commit.
7. Select the **right arrow** to move the server to the *Assigned* list.
8. To add Dual Commit regions to the board, select the **Region List** tab.
9. Select the **region** or **regions** you want to assign from the *Available* list, and select the **right arrow** to move the regions to the *Assigned* list.
10. Select the **Save** button to save the board configurations, or select the **Cancel** button to abort the operation.
11. Repeat these steps for each input view.

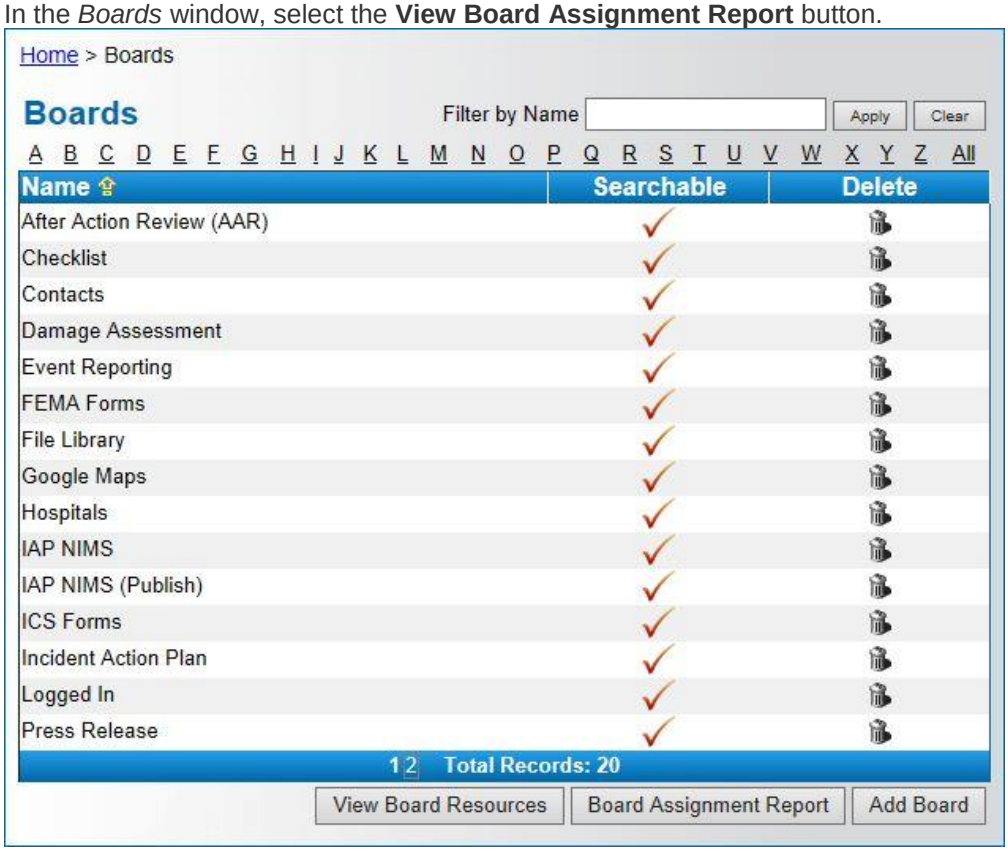
Viewing the Board Assignment Report

The Board Assignment Report displays which groups and menus all of the boards have been assigned to. The report opens in PDF format in a new window. You can save or print the PDF file. Only user with access to the Boards manager can access this report.

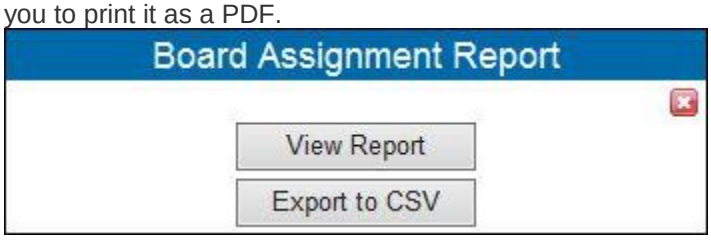
To view the Board Assignment Report, follow the steps below.

1. Select the **Boards** link in the *Process* section of the admin window.

2. In the *Boards* window, select the **View Board Assignment Report** button.



3. In the *Board Assignment Report* window, select the **View Report** button to open the Board Assignment Report in a new window or select the **Export to CSV** button to export the Board Assignment Report in a CSV file. Opening the Board Assignment Report in a new window will allow you to print it as a PDF.



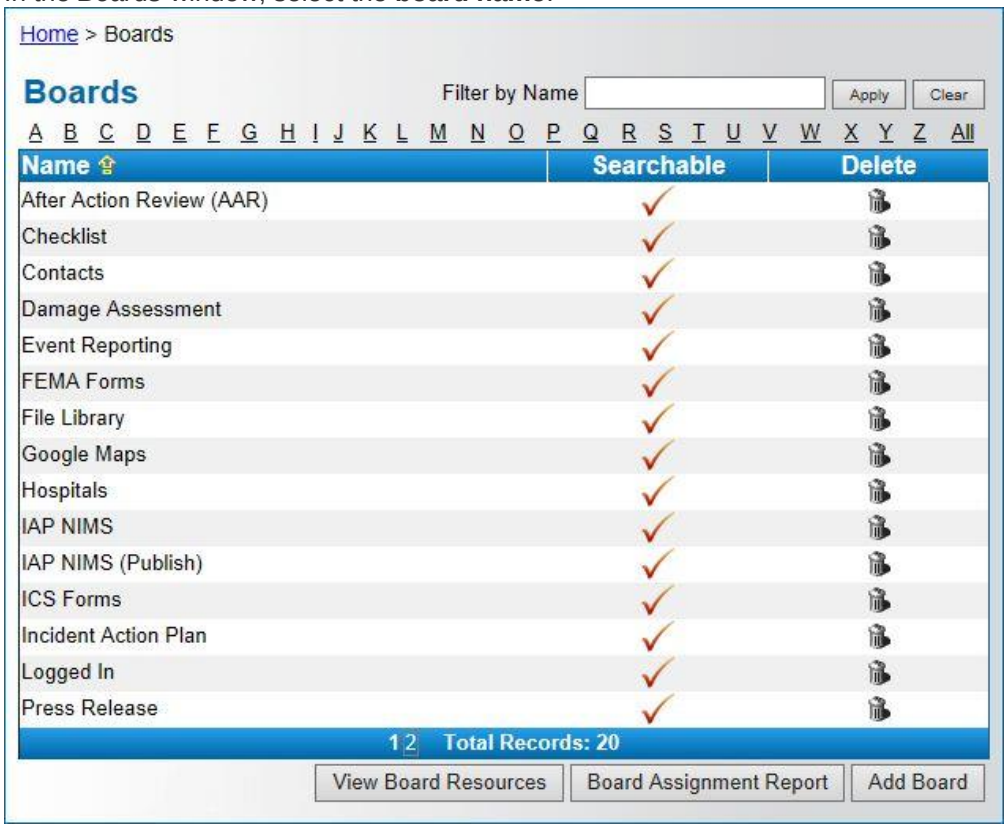
Viewing the Individual Board Assignment Report

If you want a report that only contains data for a specific board, you can access the Individual Board Assignment Report. Select the board you want to view a report for. In the Edit Board window, select the Individual Board Assignment Report button. The report will open in PDF format in a new window. You can save or print the PDF file. See the Basic Board Building topic for detailed instructions on the Individual Board Assignment Report.

To view the Individual Board Assignment Report, follow the steps below.

1. Select the **Boards** link in the *Process* section of the admin window.

2. In the *Boards* window, select the **board name**.



3. In the *Edit Board* window, select the **Individual Board Assignment Report** button.

4. In the *Individual Board Assignment Report* window, select the **View Report** button to open the Individual Board Assignment Report in a new window or select the **Export to CSV** button to export the Individual Board Assignment Report in a CSV file. Opening the Individual Board Assignment Report in a new window will allow you to print it as a PDF.

The Dual Commit Manager

Dual Commit and remote boards are tools for agencies that need to communicate with other agencies outside their firewall. Dual Commit allows users to avoid the confusion of having to log directly into two or more WebEOC systems, thus facilitating information sharing among agencies using WebEOC (for example, between counties and state EOCs or like agencies).

Dual Commit allows agencies to automatically or selectively decide which board entries to post to an outside server, keeping sensitive information within your organization. It is similar to logging into another server and posting information, but through a WebEOC administrative configuration, the client can post information to more than one server without having to log out of the local server and onto the remote servers. This allows for a convenient data sharing solution among multiple WebEOC agencies.

Individual status boards can be set to either auto or manually Dual Commit. If the Auto check box is not selected for the board, then each individual entry must be manually pushed to the remote server at the discretion of the user.

The Dual Commit manager allows you to maintain a list of servers available for Dual Commit. This list is updatable, allowing servers to be added, modified, and deleted as needed.

In order to successfully execute the Dual Commit operation, an identical copy of each status board designated for Dual Commit must reside on each source and each target.

Each time a new board is added and configured for Dual Commit, the board must be added to the target servers. This can be accomplished using the Import/Export Board tool in the Boards manager. Once the new board is added to the target server, remember to set applicable group permissions on the target server as well.

If changes are made to a Dual Commit board, identical changes must be made on the target servers either manually or by copying the HTML of the input and display views for the board to each target server through the Advanced Board Editor.

Alternatively, the Import/Export Board tool may be used. If this utility is used to update a board on a target server, import the updated board, and then reset group permissions for the board.

See the Advanced Board Building topic for detailed instructions on using the Advanced Board Editor and Import/Export Board tools.

The Test Connection feature in the Dual Commit manager executes an automated test between the local server and the target server to verify configuration parameters during setup.

Prerequisites

You must meet the following requirements in order to implement the Dual Commit and Remote Boards features.

You must have a licensed copy of WebEOC 7.0 or higher.

Note: Dual Commit may not be possible between dissimilar versions of WebEOC (for example, v6.2.5 and v7.0).

The Dual Commit target or remote board WebEOC server must be accessible by the WebEOC server executing Dual Commit or Remote Board functions. This network access must support TCP/IP. If SSL is implemented, access over port 443 is required. If SSL is not implemented, access over port 80 is required.

Status boards configured as Dual Commit on the local server must also be available on the target server. When a new board is added or an existing board is modified on the local server, the same changes must be performed on the target server. Board names and field names on the target server must be identical to the board names and field names configured for the board on the local server.

User Accounts

A user account, password, and position name must be established on the target server and your local server to implement the Dual Commit and Remote Board features in WebEOC. These user accounts should only be used for Dual Commit purposes. We recommend that you distinguish the accounts from normal user accounts by selecting the Dual Commit User checkbox in the Edit User window. This will remove the user accounts from the users list. This means the account will not appear in the user name selection list wherever utilized in WebEOC (i.e, input views, display views, etc.)

The user account must also be set as Multiple User Login so multi-user access conflicts do not occur when executing these features.

Dual Commit Target Servers

Before you add a Dual Commit server, you must obtain:

- The user name, password, and position name of the user account on the target server (the server you want to log in to) and
- The URL of the target server.

The URL will be a DNS name, a host name, or an IP address along with the directory where WebEOC is located. The following are several examples of typical URLs.

- http://www.webeoc.com/eoc7/
- http://webeocserver/eoc7/
- http://10.25.35.1/eoc7/

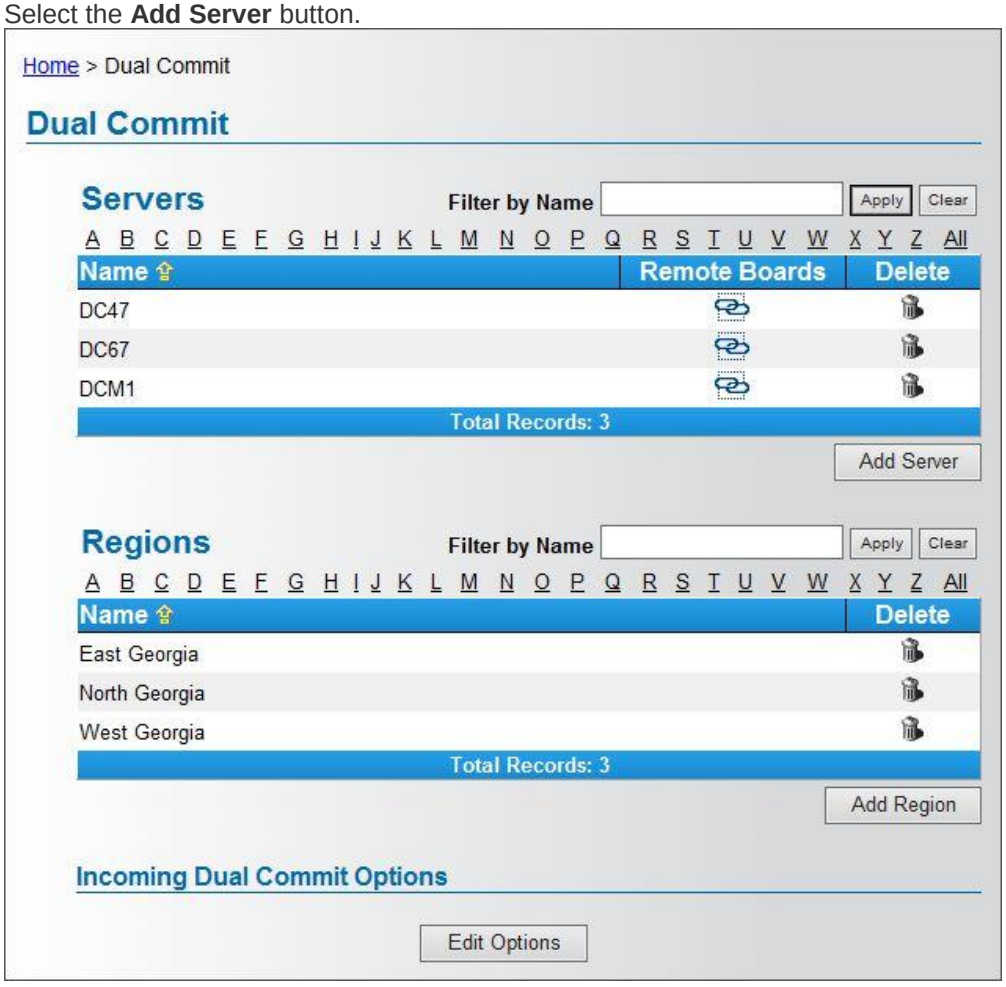
Note: You must add the forward slash (/) at the end of the URL for it to be valid.

Adding a Dual Commit Target Server

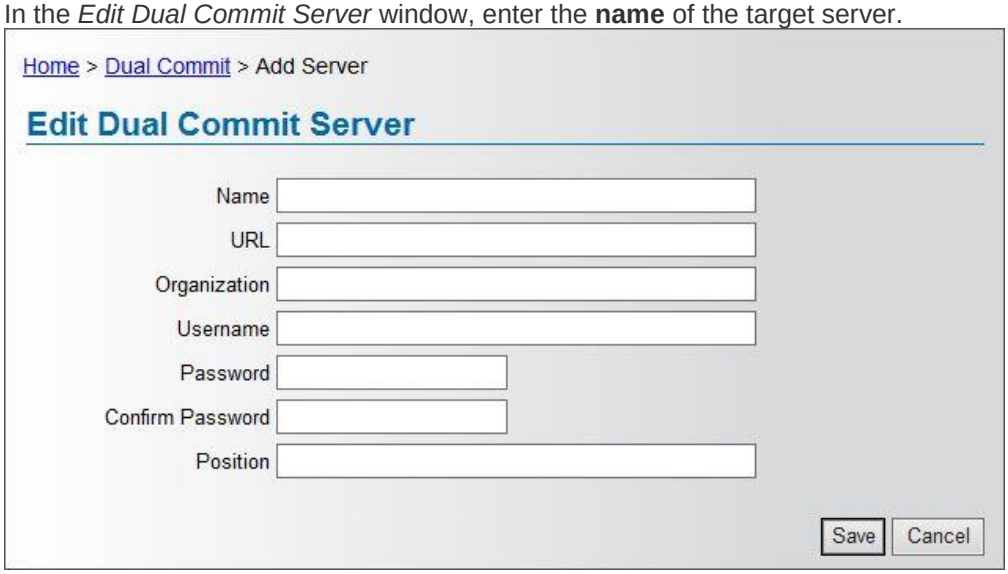
To add a Dual Commit target server, follow the steps below.

1. Select the **Dual Commit** link in the *Process* section of the admin window.

2. Select the **Add Server** button.



3. In the *Edit Dual Commit Server* window, enter the **name** of the target server.



Note: You can enter any name for the server.

4. Enter the **URL** of the target server in the *URL* field.

5. In the *Organization* field, type **EOC Professional**. Be sure to include the space.

Note: Agencies that target a WebEOC system hosted on an ASP server should contact the Customer Support Center for the appropriate organization information.

6. Enter the **user name** and **password** of the Dual Commit user account on the target server in the *Username* and *Password* fields.

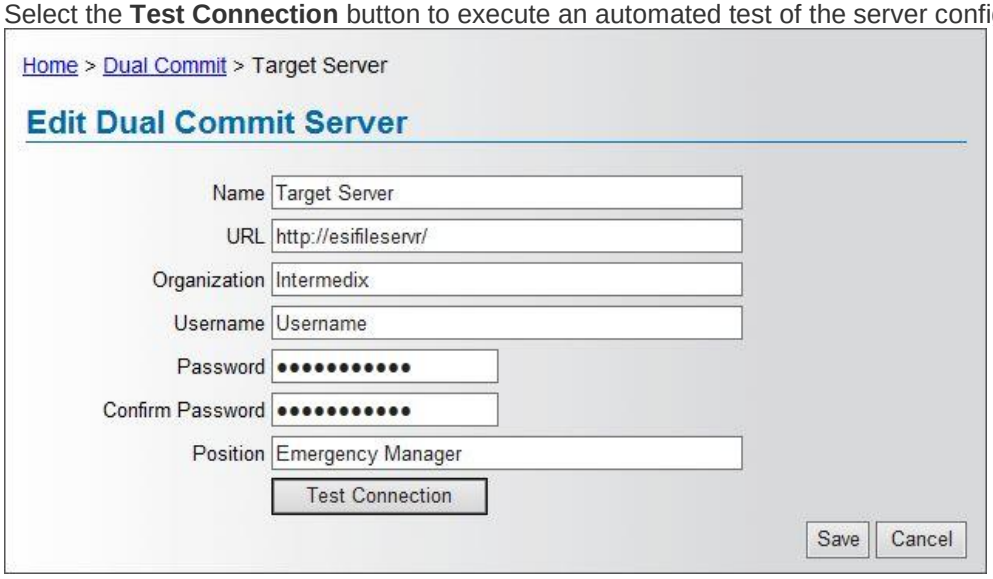
7. Reenter the password in the *Confirm Password* field.

8. Enter the **position** of the Dual Commit user account in the *Position* field.

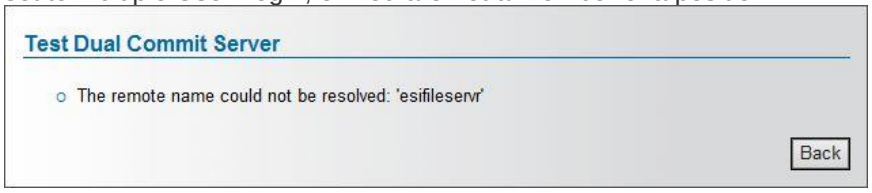
9. Select the **Save** button, or select the **Cancel** button to abort the operations.

10. From the Dual Commit window, select the **name** of the server.

11. Select the **Test Connection** button to execute an automated test of the server configuration.

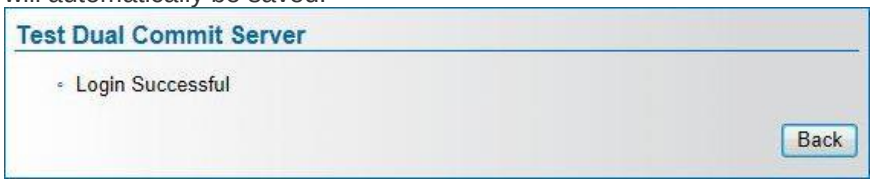


   a. If you have entered any information incorrectly, you will receive an error. Some of the errors include: The remote name could not be resolved: 'sevr'; Invalid URL; Invalid Organization Name; Invalid Username or Password; User account on target server is not set to Multiple User Login; or You are not a member of a position.



b. If you receive the “You are not a member of a position” error, the position configured for the user account may not have the proper permissions on the target server. Contact the administrator of the target server.

c. The successful connection message indicates your settings are correct and the settings will automatically be saved.



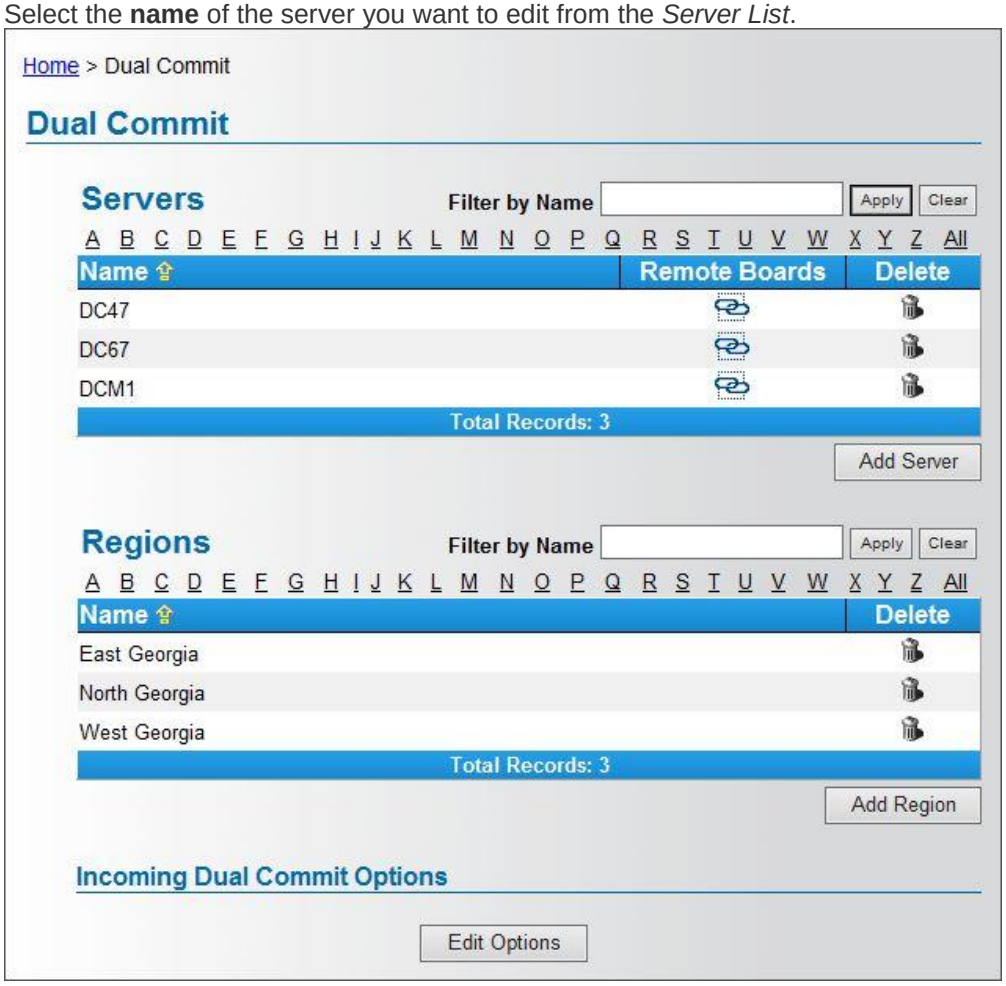
12. After you have added the target server, you need to set up the queuing option for incoming Dual Commit entries. See the *Incident Mapping* section in this topic.

Editing a Dual Commit Target Server

To edit a Dual Commit target server, follow the steps below.

1. Select the **Dual Commit** link in the *Process* section of the admin window.

2. Select the **name** of the server you want to edit from the *Server List*.



3. In the *Edit Dual Commit Server* window, make your changes.

4. After you have made your changes, select the **Test Connection** button to execute an automated test of the server configuration.

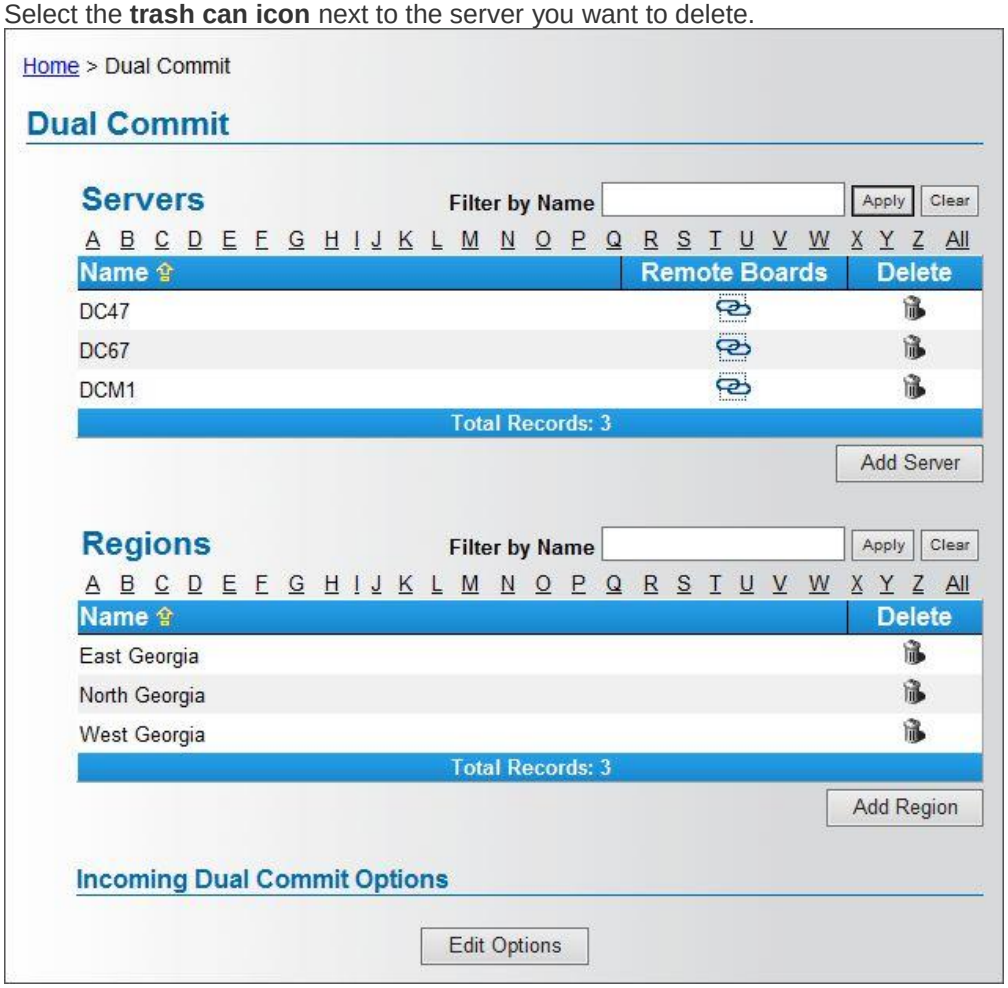
Note: If you receive the You are not a member of a position *error, contact the administrator of the target server. If you receive any other error, contact the Customer Support Center. The successful connection message indicates your settings are correct and the settings will automatically be saved.*

Deleting a Dual Commit Target Server

To delete a Dual Commit target server from your WebEOC, follow the steps below.

1. Select the **Dual Commit** link in the *Process* section of the admin window.

2. Select the **trash can icon** next to the server you want to delete.



3. When the delete confirmation dialog box appears, select the **OK** button to delete the target server, or select the **Cancel** button to abort the operation.

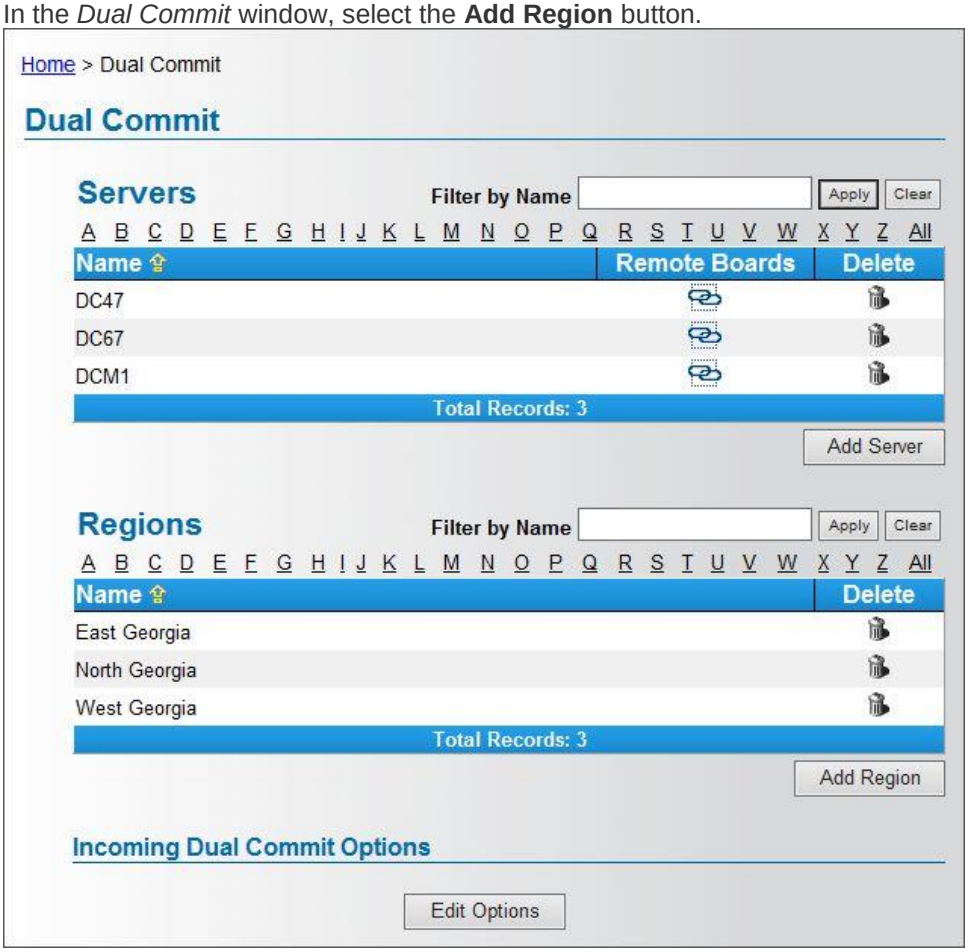
Dual Commit Regions

Dual Commit servers configured in the Dual Commit manager are displayed in the board's input view in list format. If a board is being pushed to a large number of other agencies' WebEOC systems, this list can be simplified by grouping servers to display as a single checkbox in the input view. These server groupings are called Dual Commit regions. Dual Commit allows you to selectively assign a single or combination of Dual Commit servers and regions on a board-by-board basis. You only need a single Dual Commit server to create a Dual Commit region.

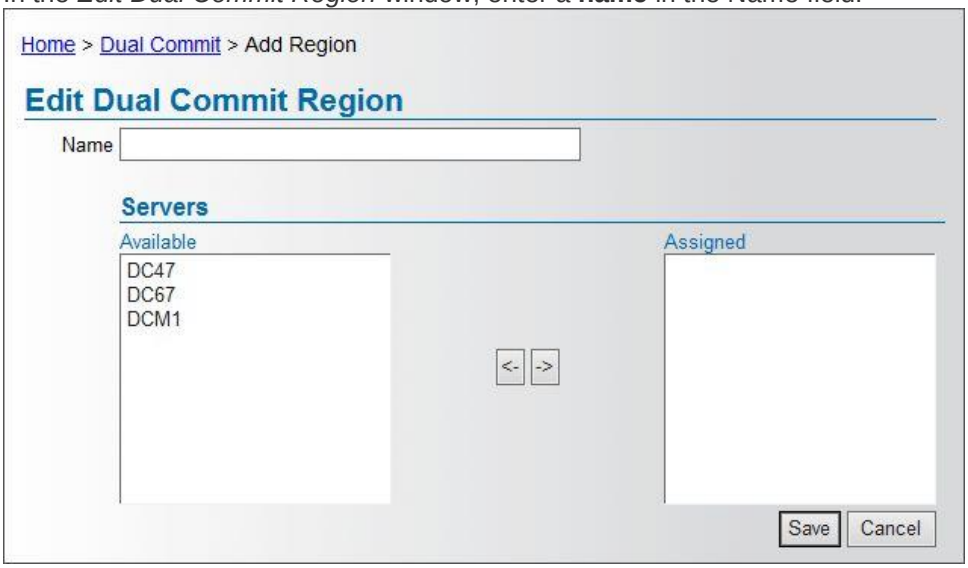
Adding a Dual Commit Region

To add a Dual Commit region, follow the steps below.

1. In the *Dual Commit* window, select the **Add Region** button.



2. In the *Edit Dual Commit Region* window, enter a **name** in the Name field.



3. Select the **servers** from the *Available* list that you want to assign to the list item, and select the **right arrow** to move the servers to the *Assigned* list.

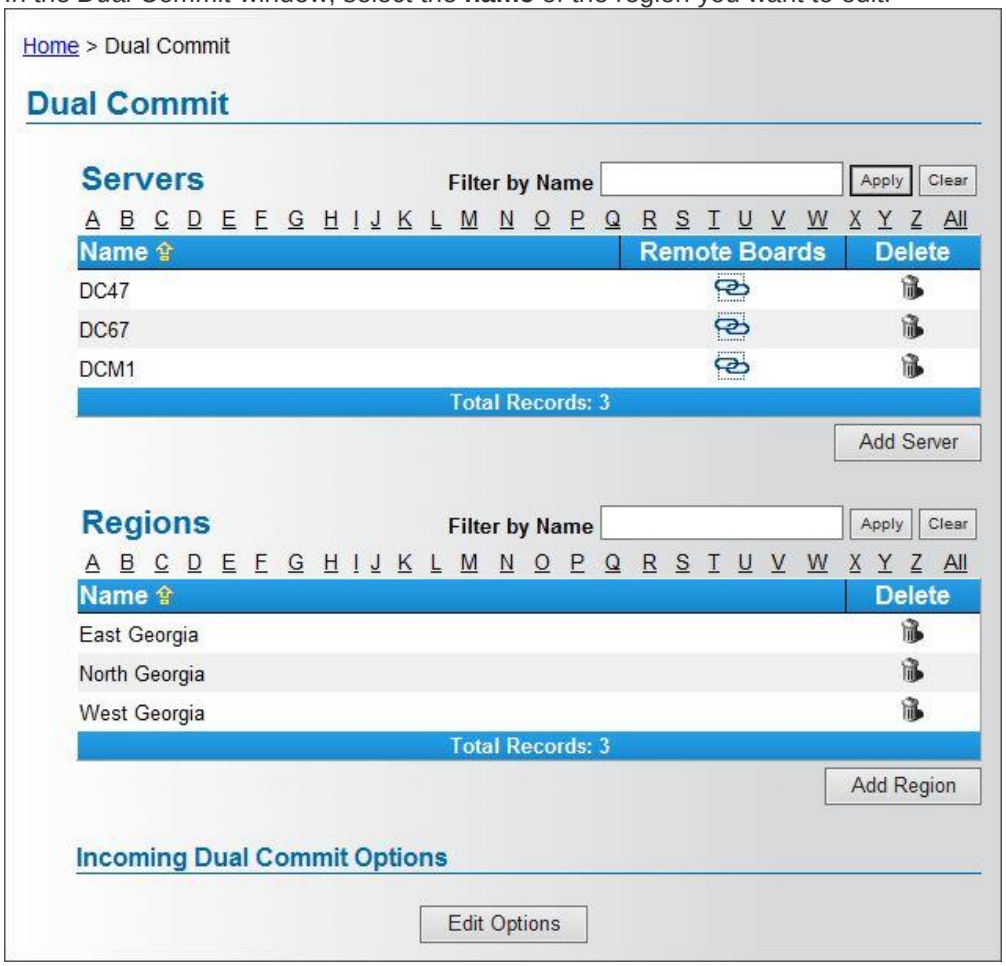
4. Select the **Save** button to save the Dual Commit region, or select the **Cancel** button to abort the operation.

5. After you have created a Dual Commit region, it can be assigned to the appropriate boards through the *Boards* manager. See the *Basic Board Building* topic for detailed instructions on assigning Dual Commit regions to a board.

Editing a Dual Commit Region

To edit a Dual Commit region, follow the steps below.

1. In the *Dual Commit* window, select the **name** of the region you want to edit.



2. In the *Edit Dual Commit Region* window, make your changes.

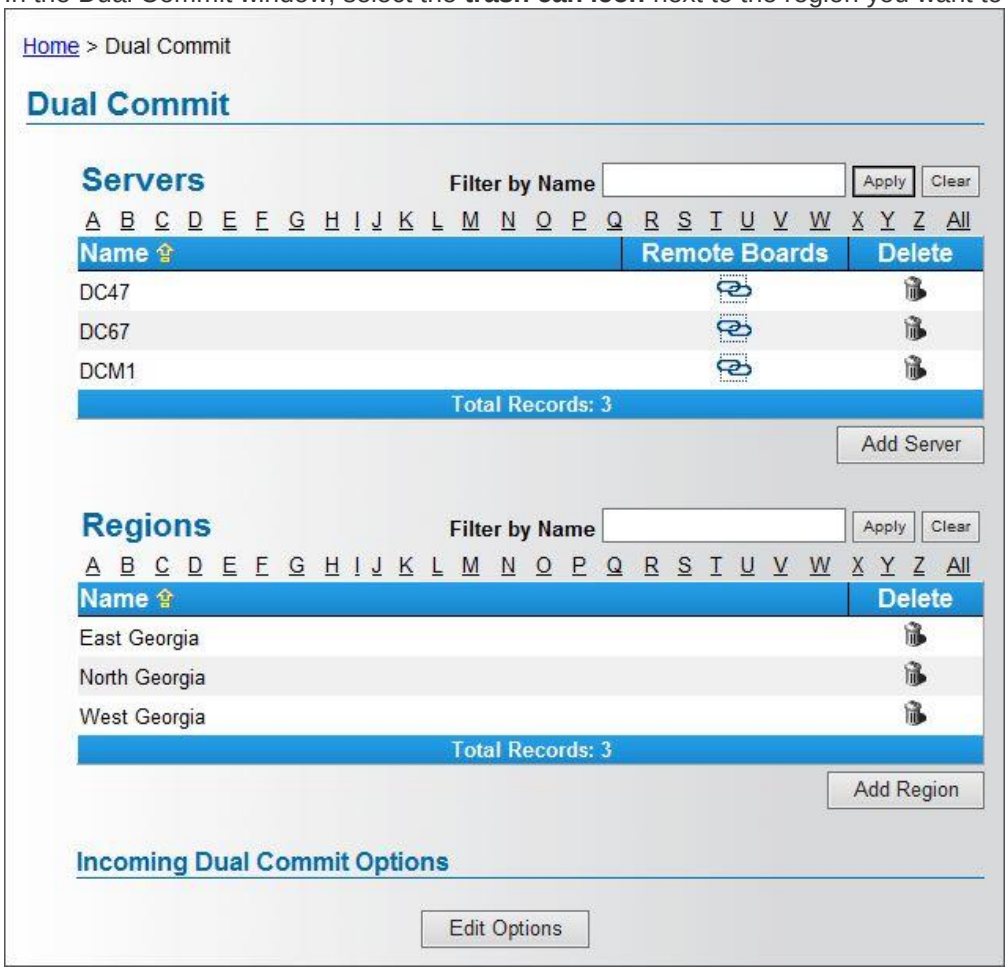
3. Select the **Save** button to save your changes, or select the **Cancel** button to abort the operation.

Deleting a Dual Commit Region

To delete a Dual Commit region, follow the steps below.

1. Select the **Dual Commit** link in the *Process* section of the admin window.

2. In the Dual Commit window, select the **trash can icon** next to the region you want to delete.



3. When the delete confirmation dialog box appears, select the **OK** button to delete the region, or select the **Cancel** button to abort the operation.

Adding Dual Commit Functionality to a Board

In order to “push” data to a target server, the board on your server (the host server) must be configured to use Dual Commit. See the Basic Board Building topic for detailed instructions on creating, importing, and exporting boards.

Dual Commit allows you to share a board with another agency. Sharing a board requires the following three processes.

- Export the board
- Send the board to the target server
- Configure the board on the host server to use Dual Commit

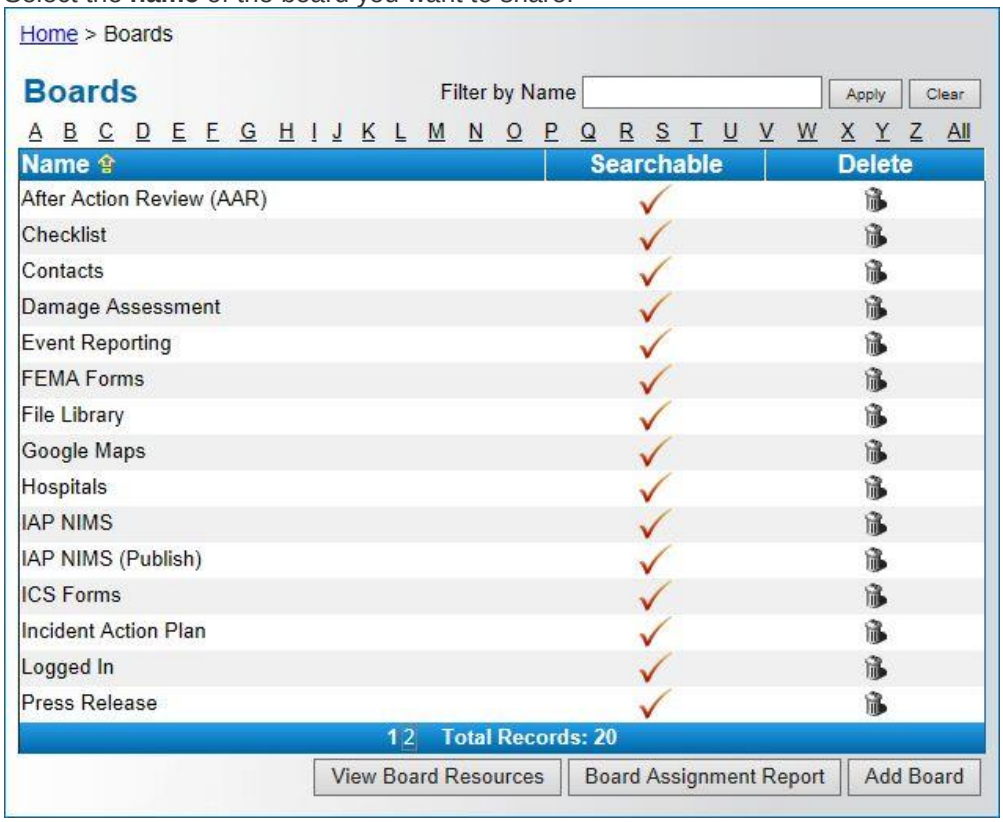
Configuring a Board to Dual Commit

For a Board with Only One Input View

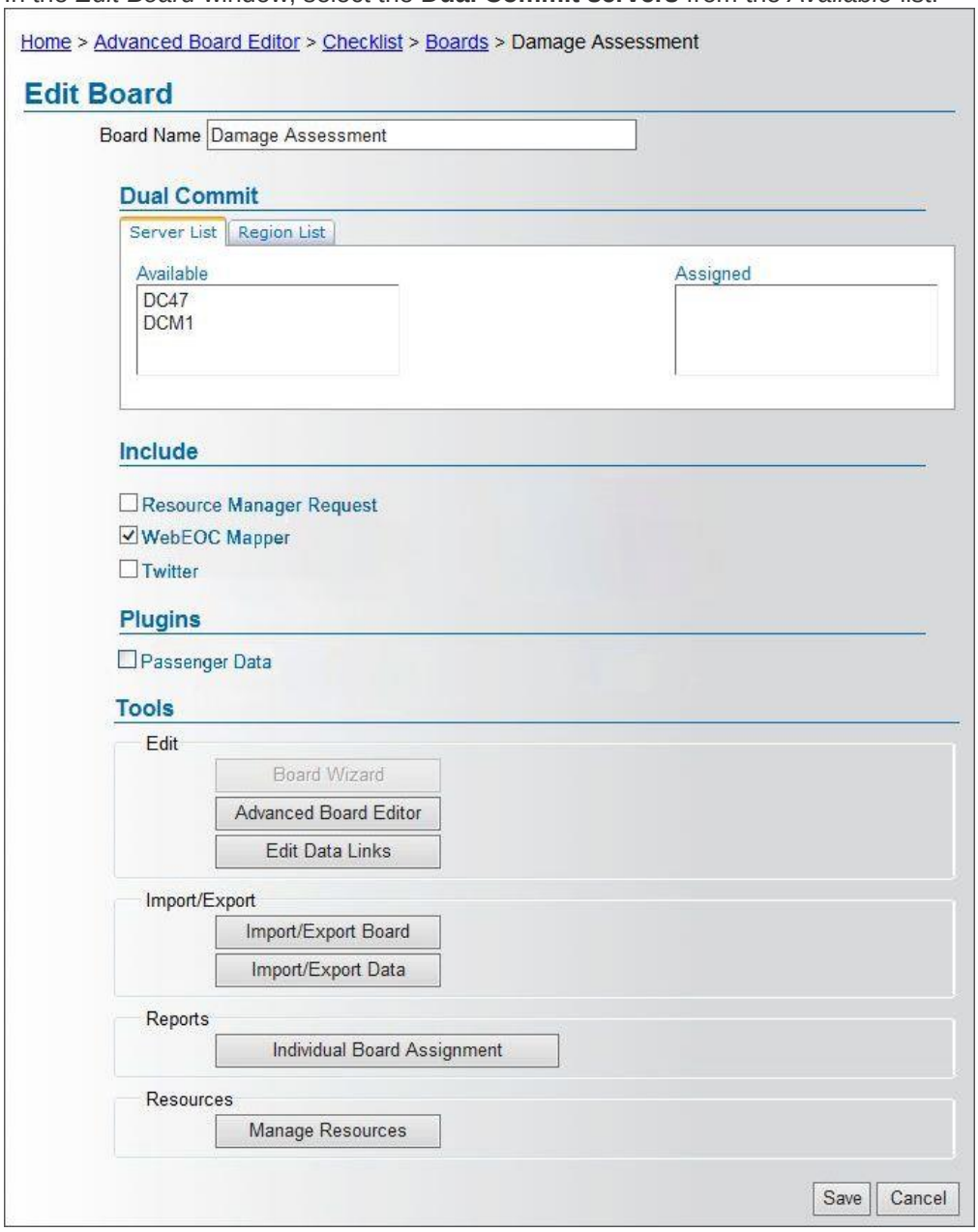
To set a board with only one input view to Dual Commit, follow the steps below.

1. Select the **Boards** link in the *Process* section of the admin window.

2. Select the **name** of the board you want to share.

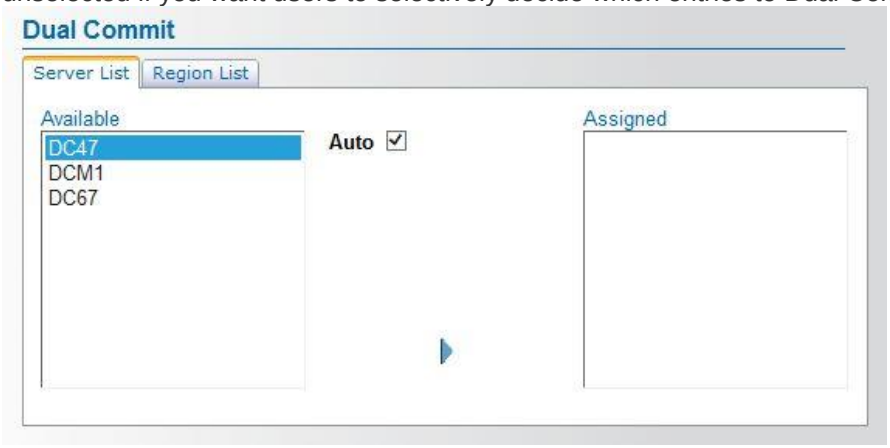


3. In the *Edit Board* window, select the **Dual Commit servers** from the *Available* list.



Note: The servers listed in the Available box are the host servers. Moving the host server to the Assigned allows the selected board data to be committed to the target server.

4. Select the **Auto** check box if you want all posts to be dual committed by default. Leave this box unselected if you want users to selectively decide which entries to Dual Commit.



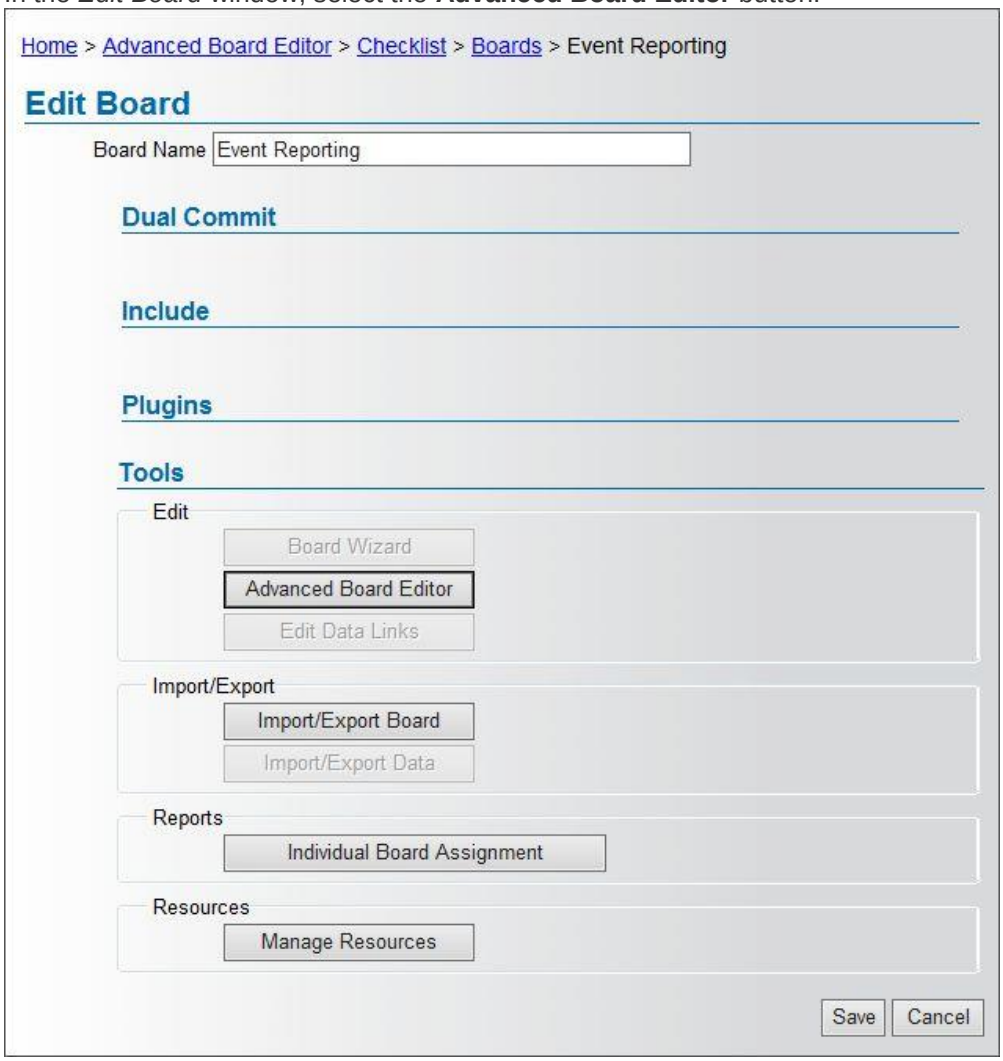
5. Select the **right arrow** to move the server to the *Assigned* list.
6. To add Dual Commit regions to the board, select the **Region List** tab.
7. Select the **region** or **regions** you want to assign from the *Available* list, and select the **right arrow** to move the regions to the *Assigned* list.
8. Select the **Save** button to save the board configurations, or select the **Cancel** button to abort the operation.

For a Board with Multiple Input Views

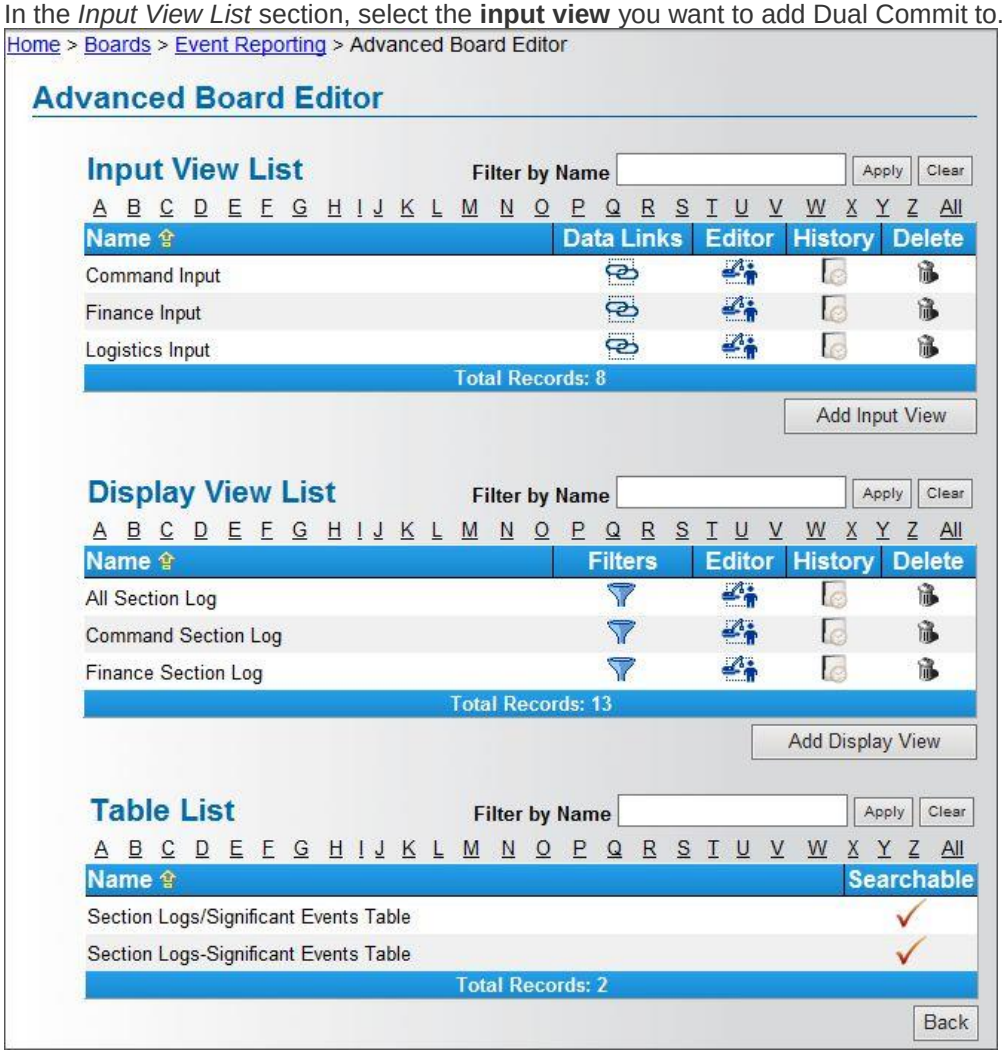
To set a board with multiple input views to Dual Commit, follow the steps below.

1. Select the **Boards** link in the *Process* section of the admin window.
2. Select the **name** of the board you want to share.

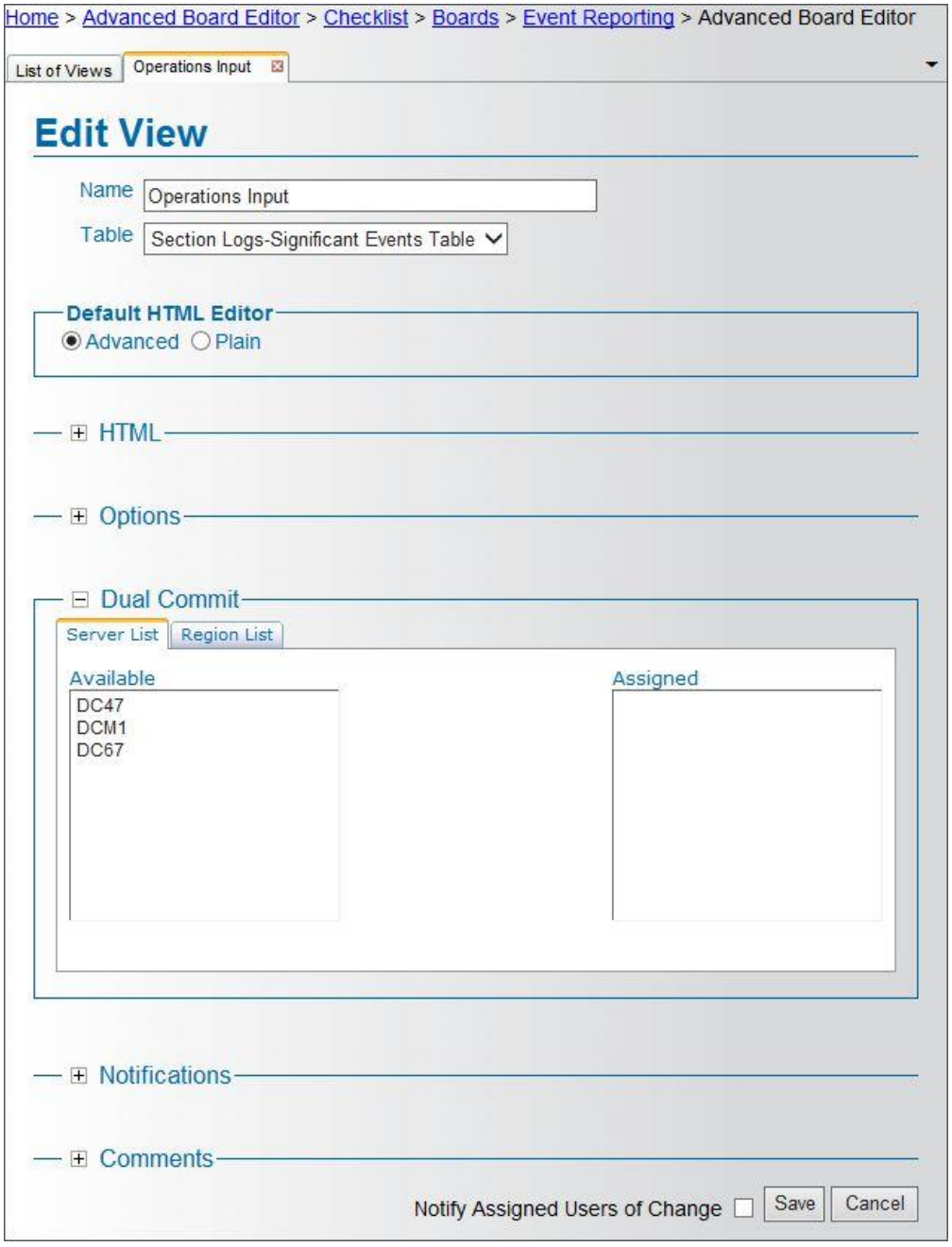
3. In the *Edit Board* window, select the **Advanced Board Editor** button.



4. In the *Input View List* section, select the **input view** you want to add Dual Commit to.



5. Under the *Dual Commit* section, in the *Server List* tab, select the **Dual Commit servers** from the *Available* list.



6. Select the **Auto** check box if you want all posts to be dual-committed by default. Leave this box unselected if you want users to selectively decide which entries to Dual Commit.

7. Select the **right arrow** to move the server to the *Assigned* list.

8. To add Dual Commit regions to the board, select the **Region List** tab.

9. Select the **region** or **regions** you want to assign from the *Available* list, and select the **right arrow** to move the regions to the *Assigned* list.
10. Select the **Save** button to save the board configurations, or select the **Cancel** button to abort the operation.
11. Repeat these steps for each input view.

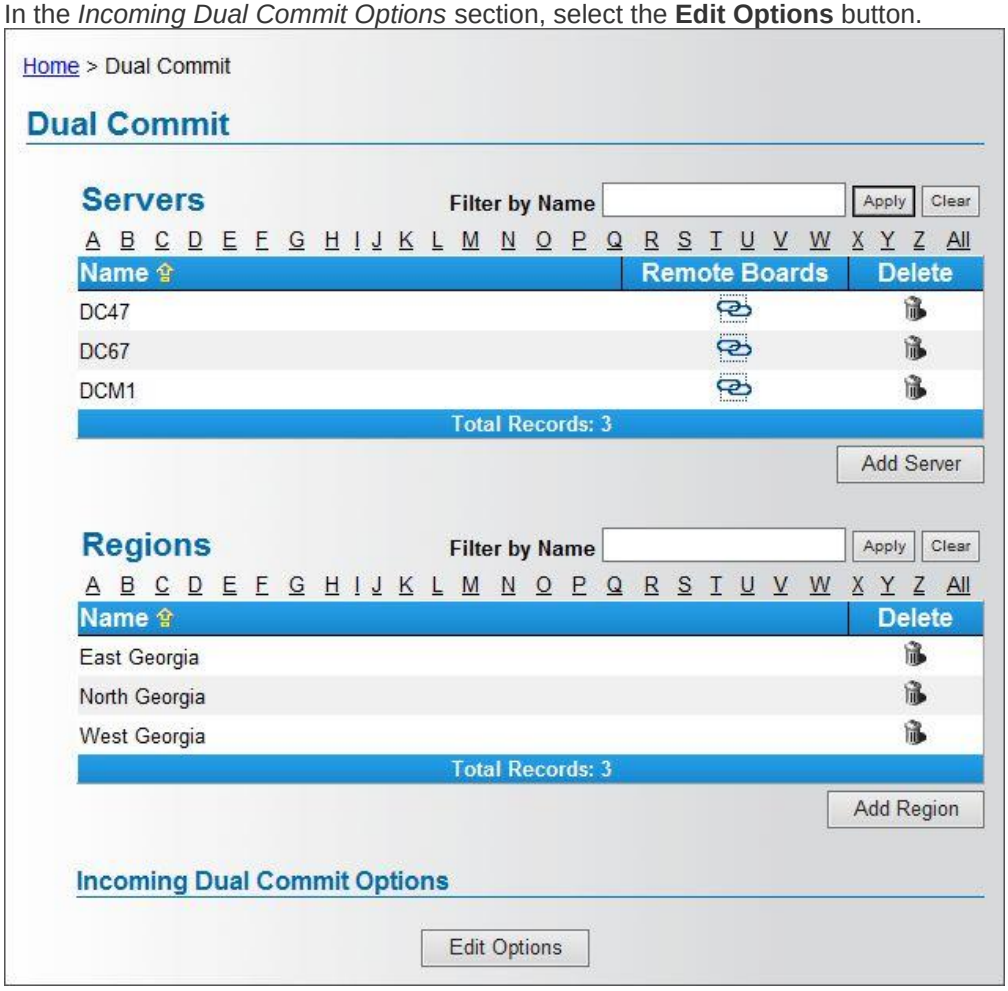
Incident Mapping

Before data can be shared using Dual Commit, the way in which incidents will be handled and synchronized must be configured on the target server. The target server can either automatically create a matching ad hoc incident for incoming Dual Commit entries or incoming entries can be queued until manually mapped to an existing incident. After an incident has been mapped, all queued dual commit entries will automatically be posted to the mapped incident.

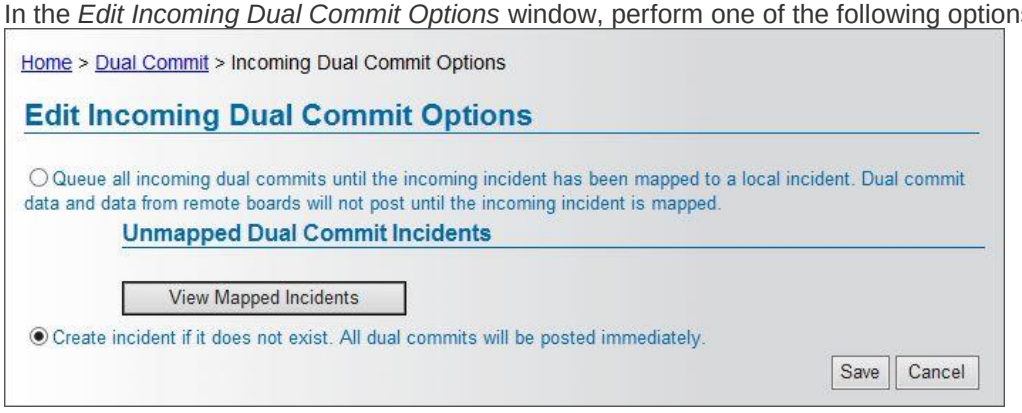
To set the incoming queuing option, follow the steps below.

1. Select the **Dual Commit** link in the *Process* section of the admin window.

2. In the *Incoming Dual Commit Options* section, select the **Edit Options** button.



3. In the *Edit Incoming Dual Commit Options* window, perform one of the following options.


Home > Dual Commit > Incoming Dual Commit Options
Edit Incoming Dual Commit Options
Queue all incoming dual commits until the incoming incident has been mapped to a local incident. Dual commit data and data from remote boards will not post until the incoming incident is mapped.
Unmapped Dual Commit Incidents
View Mapped Incidents
Create incident if it does not exist. All dual commits will be posted immediately.
Save
Cancel

- To create a new incident on the target system with the same name as the host server, select the radio button for **Queue all incoming dual commits until the incoming incident has been mapped to a local incident. Dual commit data and data from remote boards will not post until the incoming incident is mapped**.

Note: If you select this option when using remote boards, other WebEOCs will not be able to post messages to those boards or see those boards until their incidents have been mapped.

- To create a new incident on the target server with the same name as the incident on the sending server, select the radio button for **Create incident if it does not exist. All dual commits will be posted immediately**. Messages will be posted under the newly created incident.

4. Select the **Save** button to save the queuing options, or select the **Cancel** button to abort the operation.

Mapping Queued Messages

If you have opted to queue incoming messages, you now need to map the messages to a specific incident. Queued messages generate a popup message on the control panel advising that new Dual Commit entries have been received.

To map queued messages to an incident, follow the steps below.

1. Select the **Dual Commit** link in the *Process* section of the admin window.
2. Select the **Edit Options** button.
3. Select a **local incident** from the drop-down list.
4. When the *Map this Incident?* window appears, select the **OK** button to map messages to the chosen incident, or select the **Cancel** button to abort the operation.

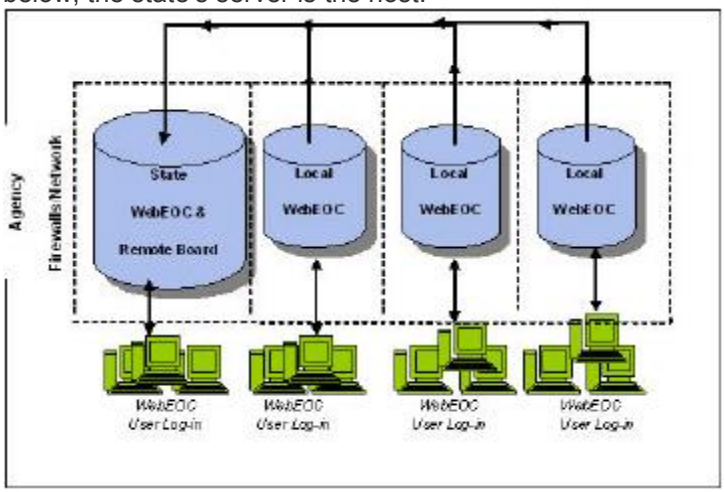
Note: Once assigned, the incident you have chosen to map messages to cannot be changed or undone. Select the Cancel button to select a different local incident.

A list of mapped incidents can be viewed by selecting the **View Mapped Incidents** button. This is a view-only window; mappings cannot be changed.

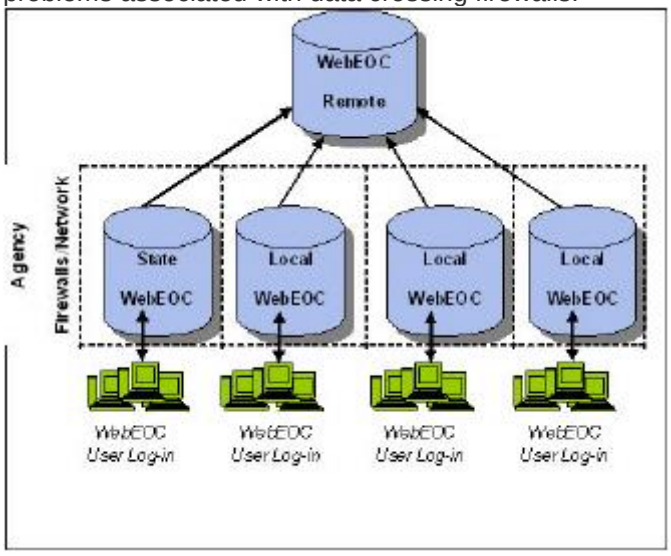
Remote Boards

Dual Commit can be configured to allow access to boards residing on other WebEOC servers directly from your control panel. Rather than maintaining copies of the board and posting data directly to every WebEOC server, a single board on one server can be accessed by multiple WebEOC instances. Users can view, sort, filter, add, and update entries as they normally would. Remote boards can be implemented in several ways.

- One of the local WebEOC servers can act as the host for the remote boards. In the example below, the state's server is the host.



- A separate server can be implemented to act as the host for the remote boards. In this configuration, information from each of the local WebEOC instances is posted to the dedicated regional or host server, as depicted below. This approach has the advantage of avoiding problems associated with data crossing firewalls.



In either configuration, data flow is in one direction: from the local servers to the host server. The local instances of WebEOC can view data posted by all local WebEOCs to the host server.

Using remote boards allows all WebEOC instances to view the same set of data from the same board. Everyone has all the information available to them and a common operational picture is maintained.

Data is stored on the server that is hosting the remote boards. If connectivity to that server is lost, data contained in the remote boards hosted on that server cannot be viewed, except by those users directly connected to the server, until connectivity is restored.

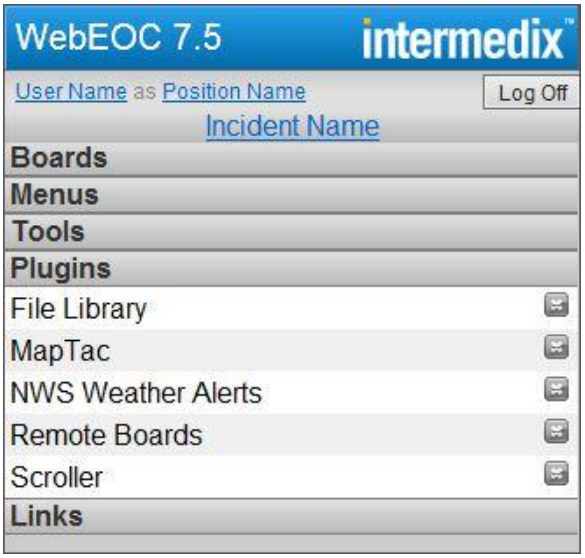
Board permissions set at the host server define the highest permission set that can be assigned at the local level. Users granted higher permissions at the local server will not be able to execute boards tasks for which permissions have not been granted at the host server.

Using Remote Boards with Dual Commit

If you implement Dual Commit, you can use remote boards to allow users access to boards residing in another WebEOC system directly from their control panel. Entries may be viewed, sorted, filtered, added, and updated as though they reside on the local server. See the “Remote Boards” section in this topic for detailed instructions.

Using Remote Boards

On the control panel, remote boards are grouped in the Plugins section under a single link named Remote Boards. The Remote Boards link on the control panel when accessed, will list the boards the user can access.



Remote boards are used just like local boards on a user's control panel. Users can add, update, view, sort, and filter data as determined by the permissions allowed at the board owner and local server levels.

Remote boards differ from local boards in that remote board displays do not refresh automatically. Remote boards refresh on a timed interval, which can take up to 60 seconds to execute. Users who are directly logged in to the owner server and viewing the same status board will see automatic refreshes. It is strongly recommended that this be emphasized during local training.

Closing the Remote Boards window will automatically close all remote boards that are currently open. If necessary, the menu window can be minimized when not in use.

Remote Board Setup and Configuration

Certain setup configurations must be completed on both the host server and the local server. Because the server acting as host must be made available across the Internet, it is strongly recommended that steps outlined for the host server in the following section be taken to secure the implementation.

The Dual Commit Server

Complete the following on the Dual Commit (host) server.

1. Follow the steps below to secure the implementation.

    a. Implement SSL. WebEOC should be accessed over the Internet using https.

    b. In the *General* manager, set parameters for the following security parameters. See the table below for recommended settings and values.

Parameter	Recommended Setting
Enforce strong passwords	enabled
Password age (expiration)	180 days
Minimum password length	8 character minimum
Account lockout threshold	3 attempts
Account lockout duration	30 minutes

2. Determine the following board permissions, (Read, Read/Write, or Read/Write/Delete) that will be granted to the local server. These permissions cannot be overridden at the local level.

    a. Identify (or add) the board or boards that will be shared.

    b. Identify the exact input and display view names for the boards.

c. Determine board permissions that will be granted to the local user (Read, Read/Write, or Read/Write/Delete). These permissions cannot be overridden by permissions set at the local level.

d. Determine if the board will be Global or Incident Independent.

    1. If set to Global, then all entries posted to the board through any active incident on the host server will be displayed and remain displayed until the incident through which it was posted is archived.

    2. Data posted to a board configured as Incident Independent will not be removed when the incident through which it was posted is archived. Nor will board data be archived.

    3. If the board is not configured for either *Global* or *Incident Independent*, then multiple incidents can be rolled up to a master view if desired.

3. Set up user accounts in the *Users* manager that will be used for the remote board feature. The user name will be posted if displayed in the remote board. In the *Edit User* window, select the **Multiple User Login** and **Dual Commit User** options.

4. Add the user account created in the previous step to a position, and assign that position to a group. Set permissions (Read, Read/Write, or Read/Write/Delete) for each board that the remote users will have access to.

5. Record the information determined and/or created in the preceding steps. You must provide the following information to the administrator of the local server to complete the remote board configuration.

    a. URL of the host server

    b. User name, password, and position name for the account to be used for the remote board feature

    c. Exact name of the board or boards

    d. Exact name of both the input view and display view for the board to which users will have access

    e. Permissions assigned for each board in the group profile

The Local Server

Before you begin, you must have the URL of the host server and user account and board information. You must also determine which groups on the local server will have access to the remote boards.

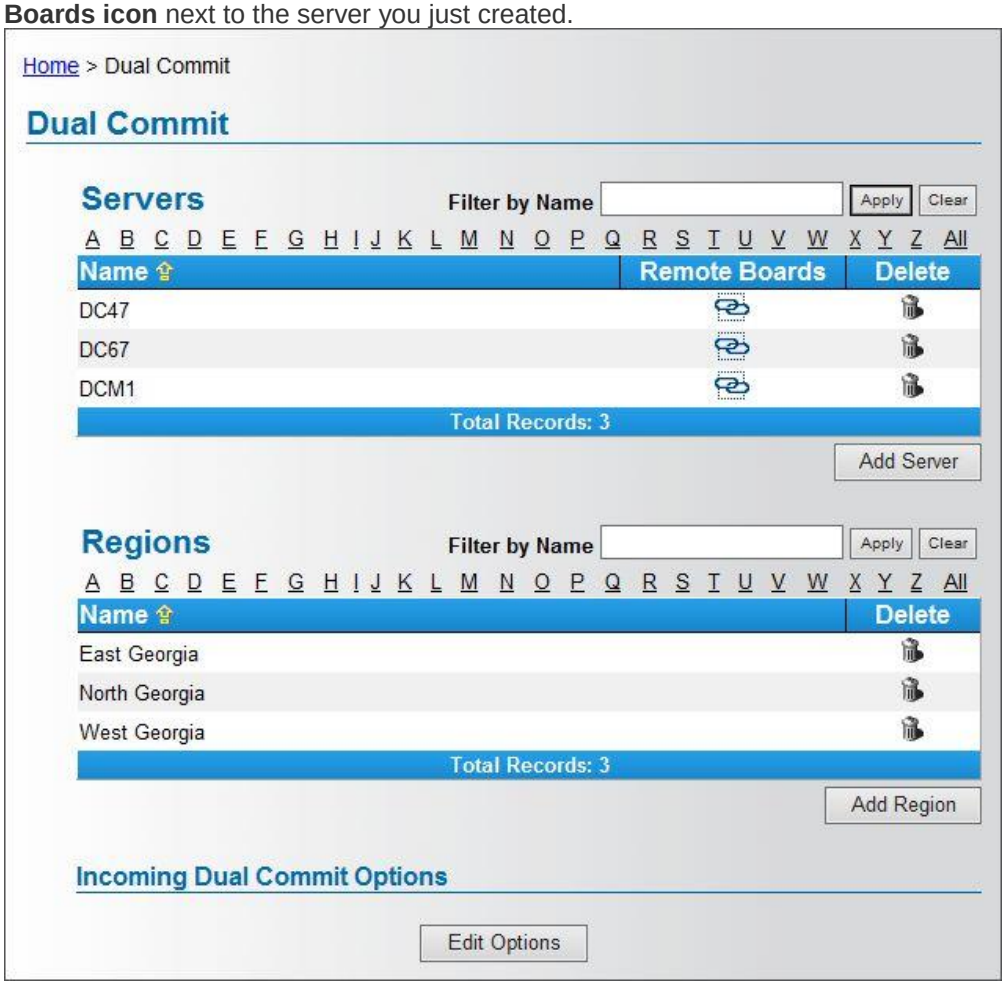
To create a Dual Commit server for the remote board function, complete the steps below on the local server.

1. Select the **Dual Commit** link in the *Process* section of the admin window.
2. Select the **Add Server** button.
3. In the *Edit Dual Commit Server* window, enter a **name** for the server in the Name field.
4. Enter the **URL** of the host server in the *URL* field.
5. Enter the **organization name** provided by the administrator of the host server in the *Organization* field.

Note: If WebEOC is installed locally, the organization name is EOC Professional. If your WebEOC is hosted by ESi, contact the Customer Support Center for the appropriate organization information.

6. Enter the **user name** provided to you by the administrator of the host server in the *Username* field.
7. Enter the **password** provided to you by the administrator of the host server in the *Password* field.
8. Reenter the **password** in the *Confirm Password* field.
9. Enter the **position** of the user account provided to you by the administrator of the host server in the *Position* field.
10. Select the **Save** button to save the Dual Commit server information, or select the **Cancel** button to abort the operation.
11. In the *Dual Commit Server List*, select the **Dual Commit server** you just created.
12. In the *Edit Dual Commit Server* window, select the **Test Connection** button to verify communication with the host server. *Login Successful* should appear in the admin window.
13. Select the **Back** button.

14. Now that you have created and tested your new Dual Commit server, you must add the remote boards to it and assign groups permission to them. In the *Dual Commit* window, select the **Remote Boards icon** next to the server you just created.

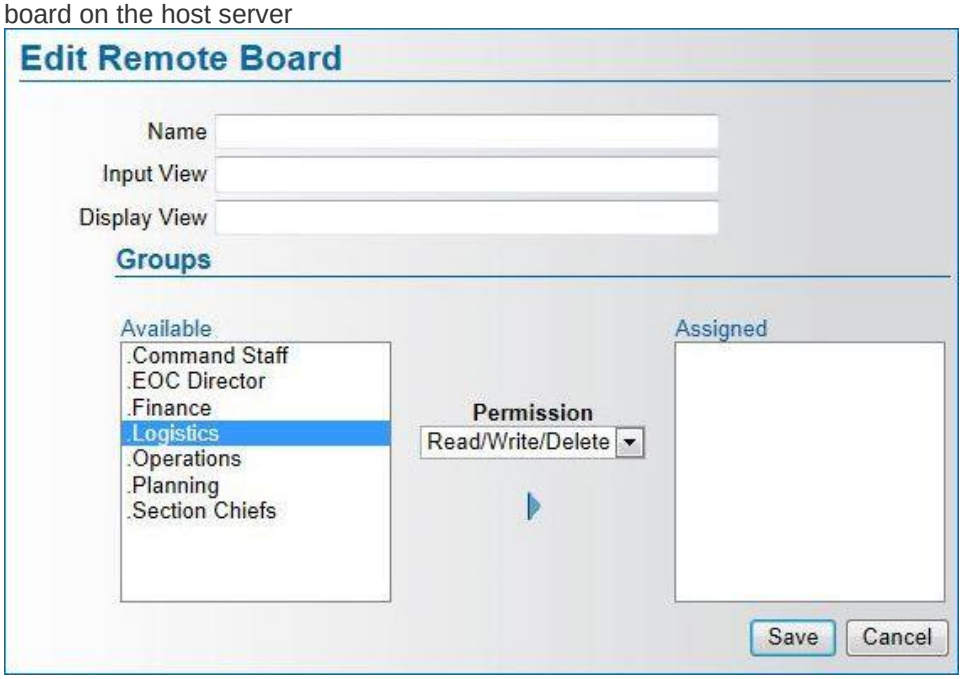


15. From the *Remote Boards List* window, select the **Add Remote Board** button.

Remote Boards List
Filter by Name
Apply
Clear
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All
Name
Delete
Press Release
Total Records: 1
Add Remote Board
Back

16. In the *Edit Remote Board* window, perform the following.

    a. Enter the **name** of the board in the *Name* field. This name must match the name of the board on the host server



    b. Enter the **exact name** of the input view in the *Input View* field.

    c. Enter the **exact name** of the display view in the *Display View* field.

    d. Select a **group** from the *Available* list that you want to assign to the list item. From the *Permissions* drop-down list, select **Read Only**, **Read/Write**, or **Read/Write/Delete**, and select the **right arrow** to move the group to the *Assigned* list.

    e. Select the **Save** button to save the assigned remote board, or select the **Cancel** button to abort the operation.

    f. Repeat these steps for each remote board.

17. To assign the remote board permission to a group, select the **Groups** link in the *User* section of the admin window. This will add the Remote Boards plug-in to the control panel of users assigned to the group.

18. In the *Groups* window, select the **name** of the group.

19. In the *Items* section, select the **Plugins** tab.

20. Select **Remote Boards** in the *Available* list, and select the **right arrow** to move it to the *Assigned* list.

21. Select the **Save** button to save the group permissions, or select the **Cancel** button to abort the operation.

The Links Manager

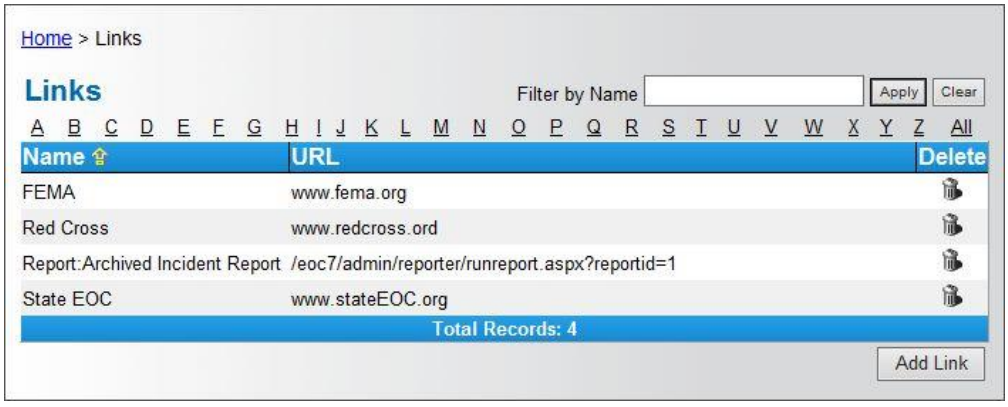
WebEOC allows you to create links to URLs (Internet or intranet) and other applications, systems, or databases. These links can be displayed on the control panel or within menus, and provide direct access to a web page, directory, file, etc., in a separate browser window.

Adding a Link

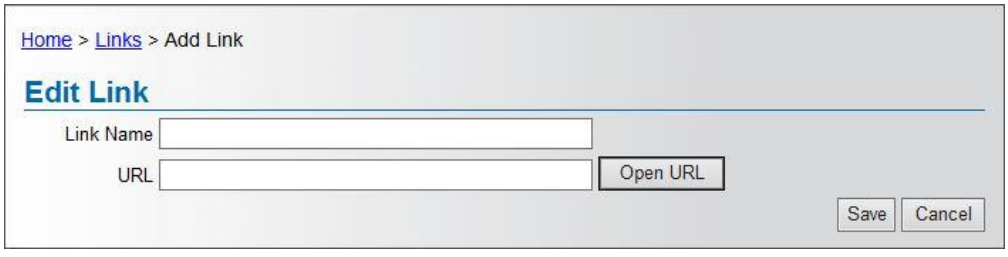
To add a link, follow the steps below.

1. Select **Links** in the *Process* section of the admin window.

2. Select the **Add Link** button.



3. Enter a **name** for the link in the *Link Name* field.



Note: The link name should be a proper name or meaningful phrase, not an address. This is the label that will be displayed on the user's control panel.

4. In the *URL* field, enter the **URL address** for the link.

Note: The address can include a domain name or IP address as well as directory or file names. Be sure to follow URL conventions (i.e., specify the protocol http:// and use the forward slash (/), not the back slash (\) to separate directory names).

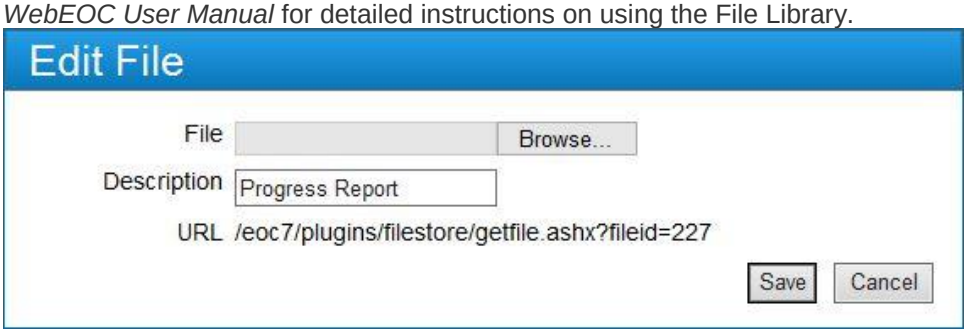
5. Select the **Open URL** button to test the link.

6. Select the **Save** button to save the link, or select the **Cancel** button to abort the operation.

Note: After you have added the new link, you need to set access privileges to the link. Access privileges are configured in the Groups manager. See the Users topic for detailed instructions on setting access privileges.

Creating a Link to a File in the File Library

Users may upload a file in the File Library that could be useful to other users. Instead of recreating that file, you can create a link to the file in the File Library. Before you create a link to the file, you need to open the file on the user side to obtain the URL. See the Help located on the control panel or the *WebEOC User Manual* for detailed instructions on using the File Library.



To create a link to a file in the File Library, follow the steps below.

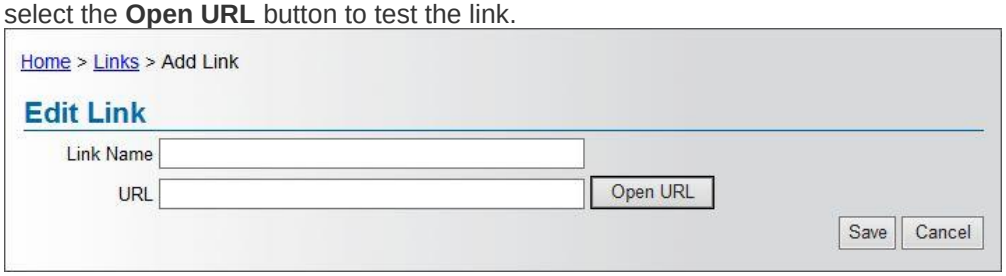
1. Select **Links** in the *Process* section of the admin window.

2. Select the **Add Link** button.

3. Enter a **name** for the link in the *Link Name* field.

Note: The link name should be a proper name or meaningful phrase, not an address. This is the label that will be displayed on the control panel.

4. In the *URL* field, enter the **URL address** that you obtained from the user side of WebEOC, and select the **Open URL** button to test the link.



5. Select the **Save** button to save the link, or select the **Cancel** button to abort the operation.

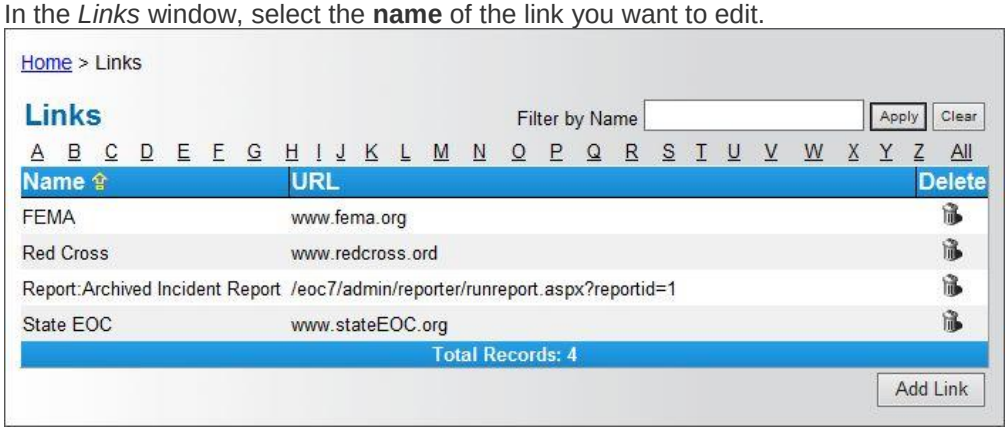
Note: After you have added the new link, you need to set access privileges to the link. Access privileges are configured in the Groups manager. See the Users topic for detailed instructions on setting access privileges.

Editing a Link

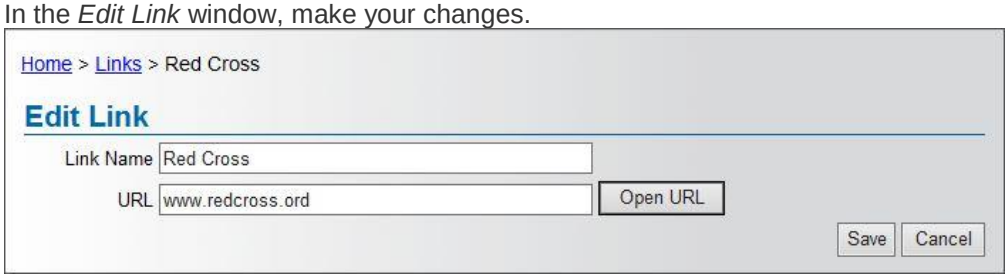
To edit a link, follow the steps below.

1. Select **Links** in the *Process* section of the admin window.

2. In the *Links* window, select the **name** of the link you want to edit.



3. In the *Edit Link* window, make your changes.



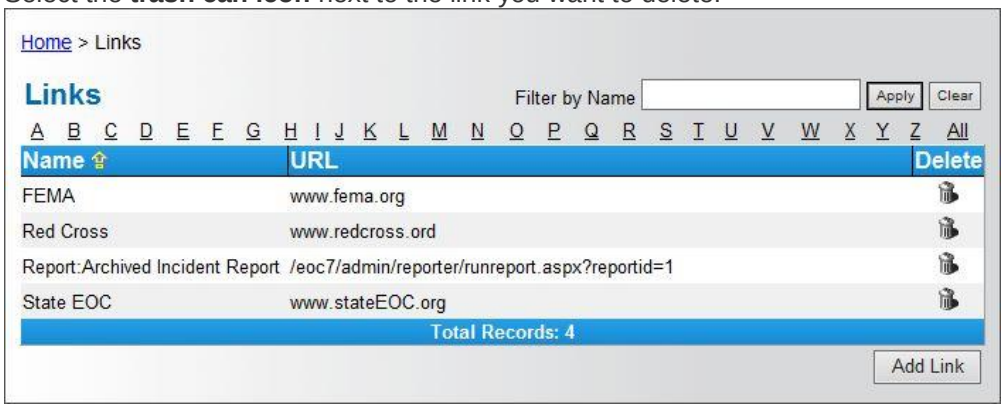
4. Select the **Save** button to save your changes, or select the **Cancel** button to abort the operation.

Deleting a Link

To delete a link, follow the steps below.

1. Select **Links** in the *Process* section of the admin window.

2. Select the **trash can icon** next to the link you want to delete.



3. When the delete confirmation dialog box appears, select the **OK** button to delete the link, or select the **Cancel** button to abort the operation. The link will be removed from the user's control panel the next time he logs in to WebEOC.

The Lists Manager

The Lists manager lists all of the default lists in WebEOC and allows you to create additional pre-defined sets of choices from which to select when entering data to status boards. Lists make data entry easier for the user and reduce typographical errors and inconsistent naming schemes. Lists can also be used to filter a status board display to show only those entries related to a specific list item.

Multi-tiered lists can be created allowing you to define multiple levels. For example, you could create a list of states. Each state could have a sub-list containing counties. Each county list could contain a list of cities. After you build a multi-tiered list, you can add it to a board in the Advanced Board Editor. See the HTML Conventions topic for detailed instructions on adding a multi-tiered list to a board.

Lists can also be used to implement tasking processes by assigning group permissions to any sub-item in a list. For example, if you want only the controller to set a task status as closed, you can assign permissions to a specific group (or groups). In this scenario, the Closed status would be made available to the authorized group configured in the Lists manager.

Colors can be assigned to items in the list. When the color is selected, it is displayed and saved with the list item configuration. Using color codes in a board display helps users interpret data more quickly and determine the importance of the data.

Other lists in WebEOC—Users, Incidents, and Positions—are created and maintained through their respective admin manager.

The following conditions should be considered when creating, modifying, or replacing lists.

- Add “Other” to each list as a catch all category.
- If the List Name is edited and that list name is used in an existing board, the information currently posted on any board using that list name will not be affected.
- If a new list (with a new name) or a new list name is created to replace an existing list, that field must be updated in any board implementing that field through WebEOC’s board builder or an external HTML editor such as Microsoft® Expression® Web.
- If a list used in existing board entries is deleted, the information currently posted on any board implementing that field will not be affected but the list field will be empty.
- If a new list with a new name, or a new list name is created to replace the deleted list, that field must be updated in the board or boards through the Boards manager.

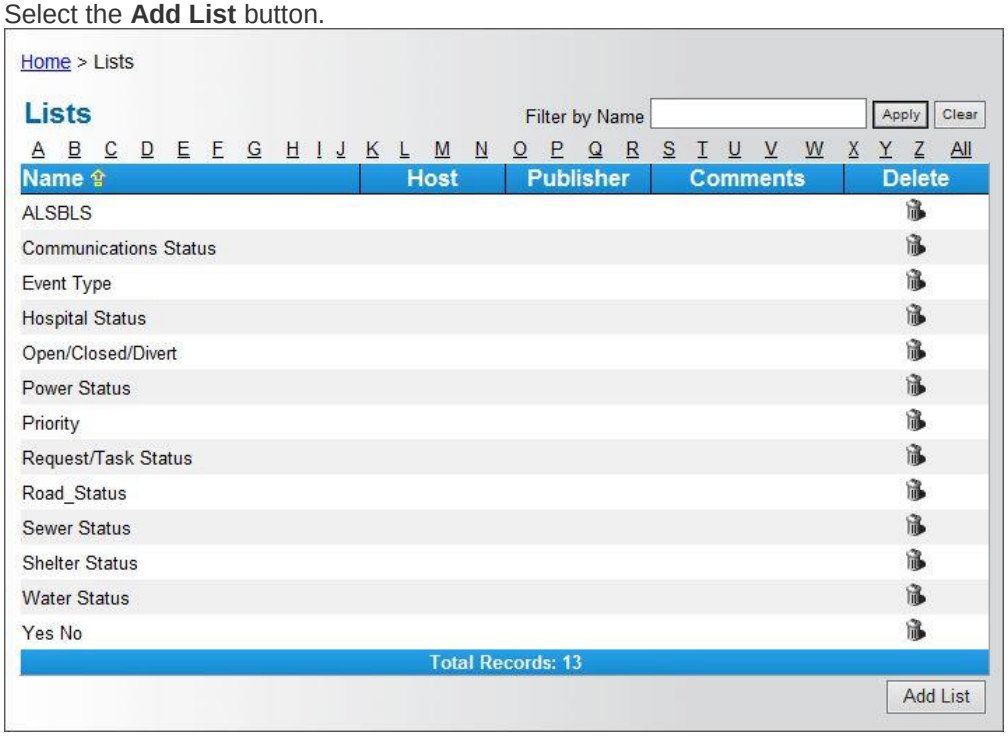
Note: Changes made to lists do not affect incident data that has been archived.

Adding a List

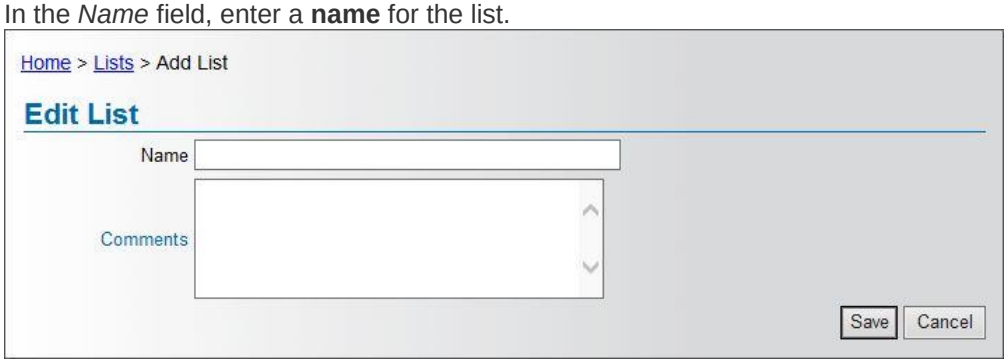
To add a list, follow the steps below.

1. Select the **Lists** link in the *Process* section of the admin window.

2. Select the **Add List** button.



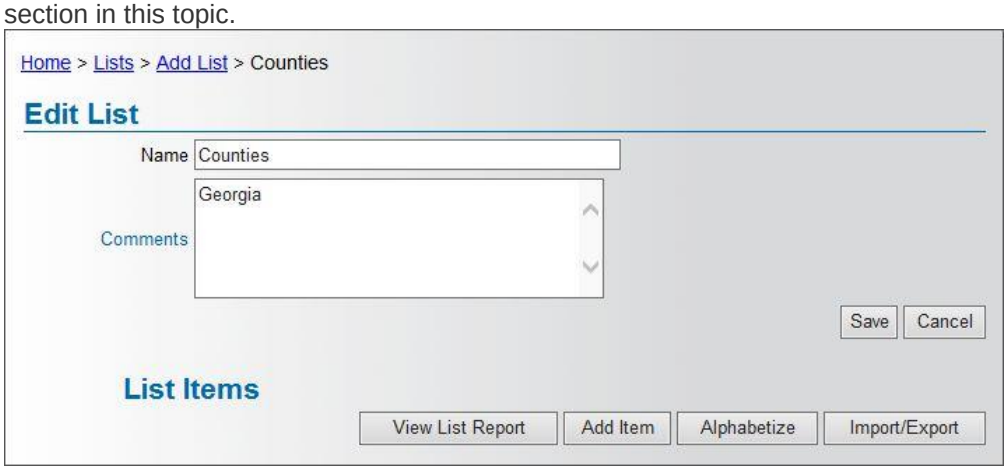
3. In the *Name* field, enter a **name** for the list.



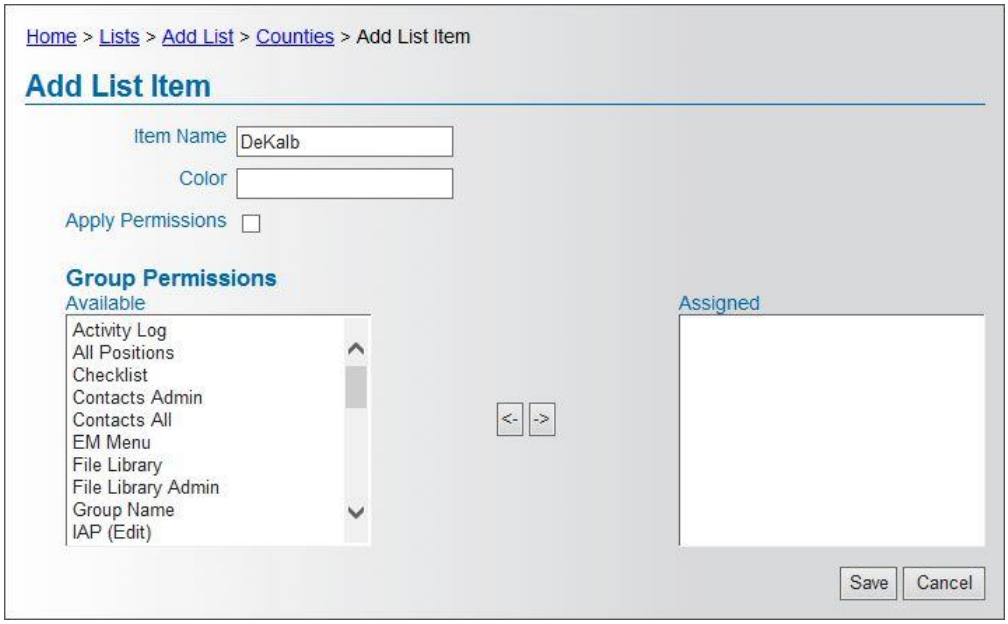
4. In the *Comments* field, enter a **description** or **additional information** for this list.

5. Select the **Save** button to save the list, or select the **Cancel** button to abort the operation.

6. Select the **Add Item** button. If you already have the list, you can import it. See the *Importing a List* section in this topic.



7. Enter a **name** for the item in the Item *Name* field.



8. To create a blank space in your list as an option, hold the **Alt** button and enter **255** on your numeric keypad.

Note: You must have a numeric keypad to do this operation. If you are using a laptop, hold the Fn and Alt buttons together, and enter 255.

9. Assign a color to the item by clicking inside the **Color field**. Use the **cross hair icon** to select the color. You can also enter a color code in the Color field.

10. If the list item is reserved for use by a specific group of users, select the **Apply Permissions** check box. If you want the list item to be available to all users, do not select the *Apply Permissions* check box.

11. Select the **group** from the *Available* list that you want to assign to the list item, and select the **right arrow** to move the group to the *Assigned* list.

12. Select the **Save** button to save the list item, or select the **Cancel** button to abort the operation. Repeat these steps to build your list.

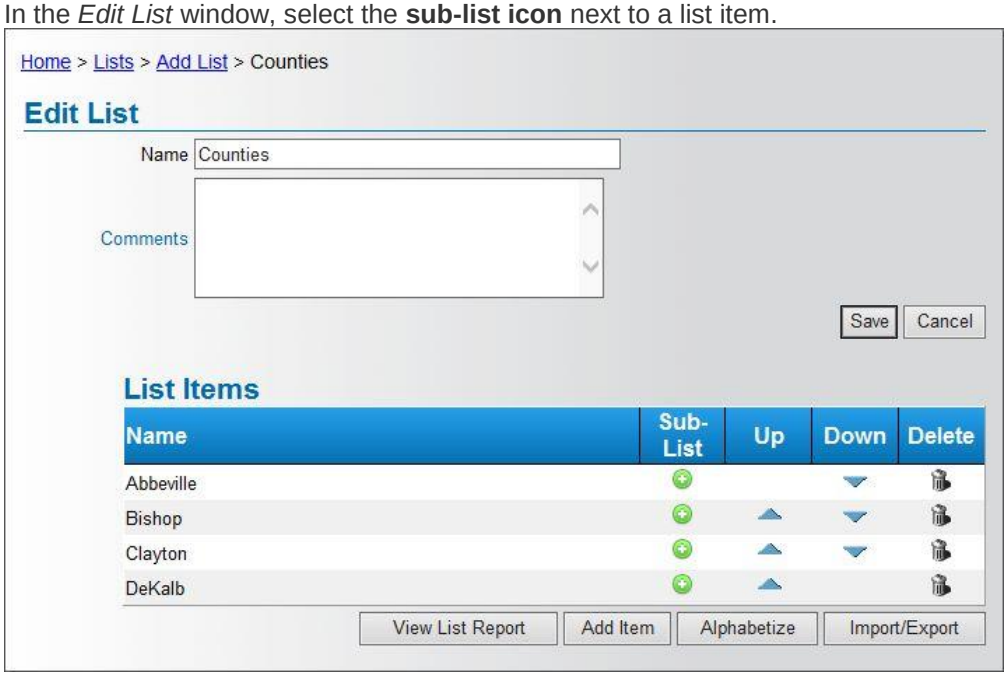
Adding Sub-lists

After you create a list, you can add a sub-list to the list. You can even add a sub-list to your sub-list. For example, if you created a list called Georgia and added every county in the state of Georgia as a list item, you could create a sub-list for every city in every county. After you have added the cities, you can add subdivisions within those cities.

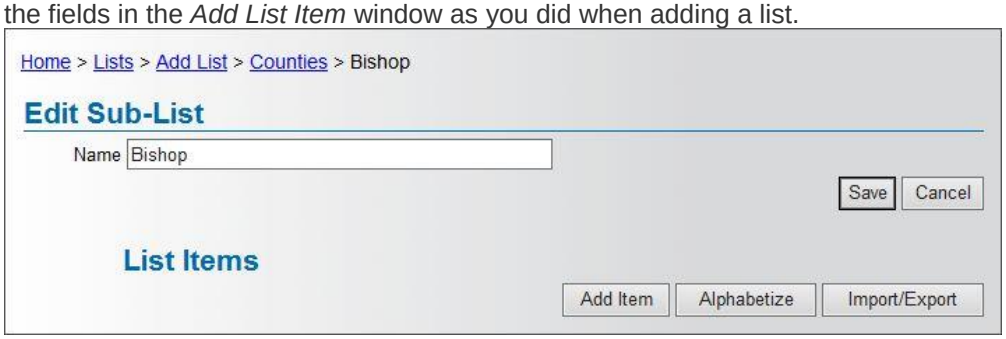
To create a sub-list, follow the steps below.

1. Select a **list** from the *Lists* window.

2. In the *Edit List* window, select the **sub-list icon** next to a list item.

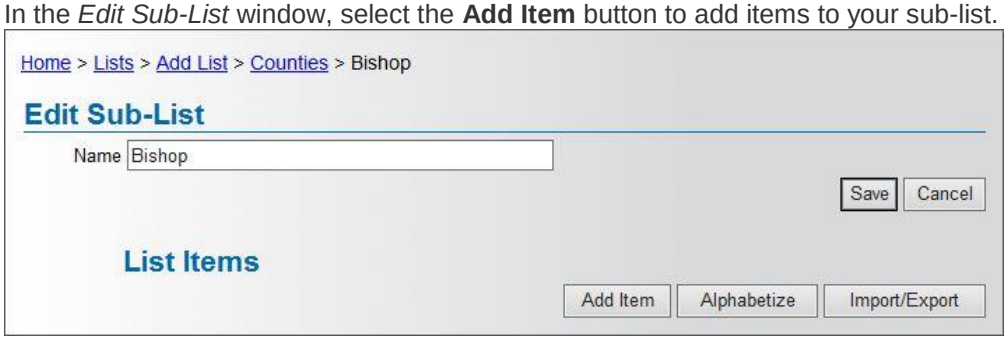


3. In the *Edit Sub-List* window, select the **Add Item** button to add items to your sub-list, and complete the fields in the *Add List Item* window as you did when adding a list.

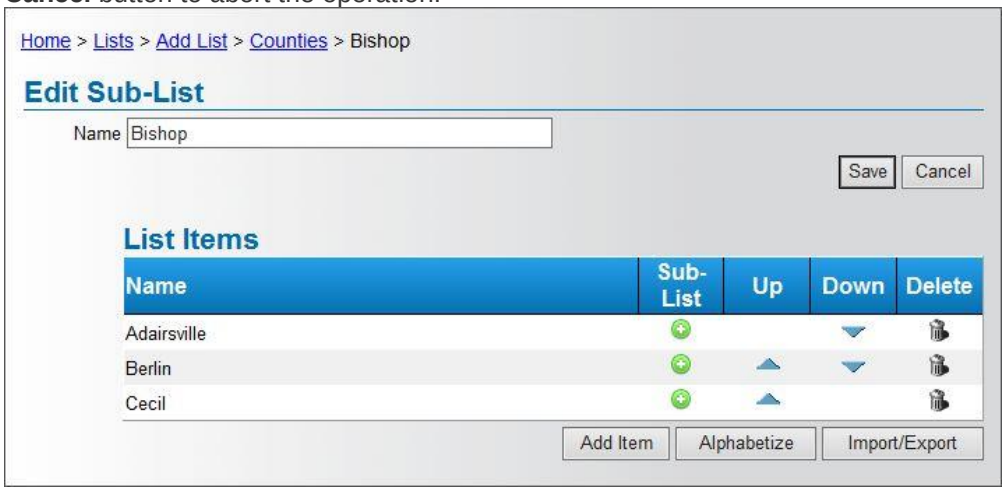


4. After you build your sub-list, you can build a sub-list for that list. In the *Edit Sub-List* window, select the **sub-list icon** next to the list item you want to add a sub-list to.

5. In the *Edit Sub-List* window, select the **Add Item** button to add items to your sub-list.



6. After you have added your sub-list items, select the **Save** button to save the list items, or select the **Cancel** button to abort the operation.

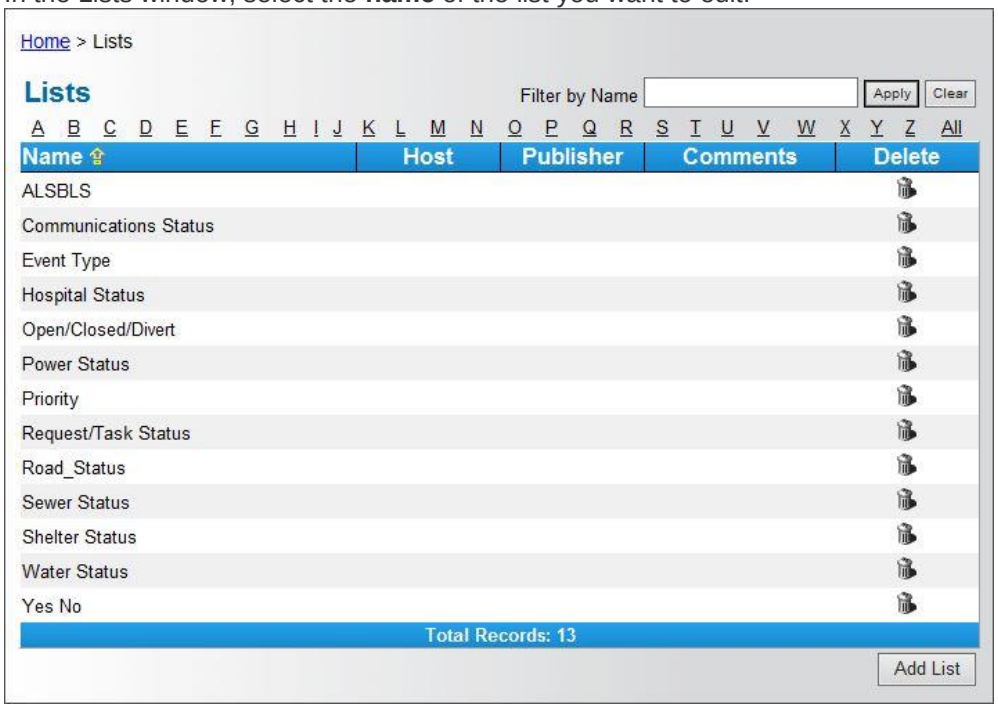


Editing a List and List Items

To edit a list and the associated list items, follow the steps below.

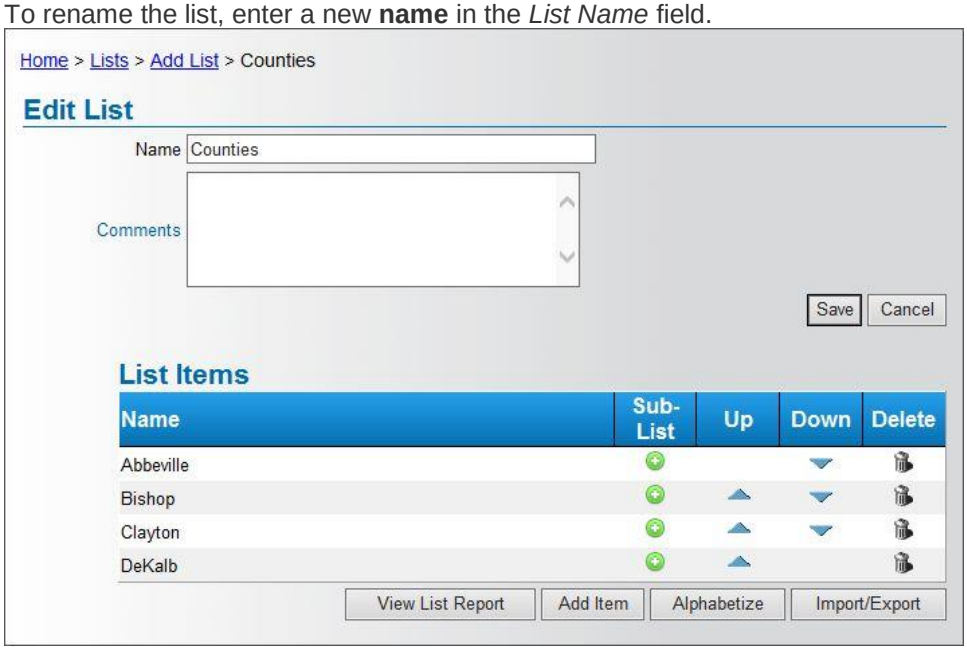
1. Select the **Lists** link in the *Process* section of the admin window.

2. In the Lists window, select the **name** of the list you want to edit.



3. In the *Edit List* window, make your applicable changes.

    a. To rename the list, enter a new **name** in the *List Name* field.



    b. In the *Comments* field, change the **description** or **additional information** if applicable.

    c. To change a list item name, select the **name** of the list item.

    d. To edit a sub-list item, select the **sub-list edit icon** next to the sub-list you want to edit.

e. To organize the items alphabetically, select the **Alphabetize** button.

f. To move an item up or down, select the **Up** or **Down** arrows.

g. To delete an item, select the **trash can icon**.

Note: For Import/Export, see sections on Importing a List or Exporting a List in this topic.

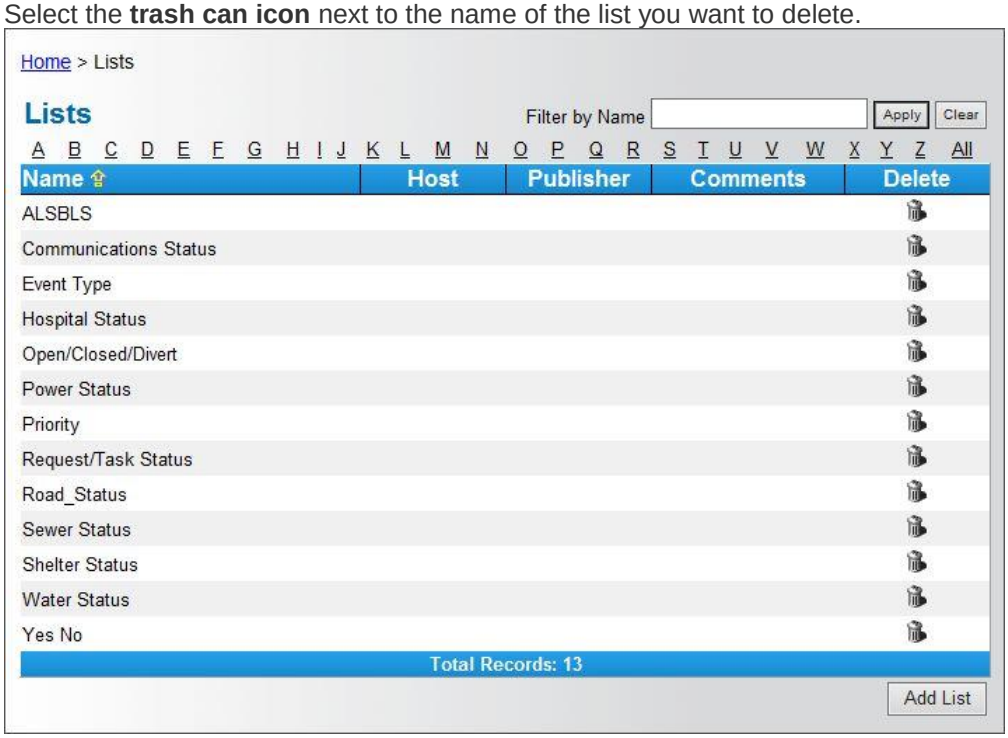
4. Select the **Save** button to save your changes, or select the **Cancel** button to abort the operations.

Deleting a List

To delete a list, follow the steps below.

1. Select the **Lists** link in the *Process* section of the admin window.

2. Select the **trash can icon** next to the name of the list you want to delete.



3. When the delete confirmation dialog box appears, select the **OK** button to delete the list, or select the **Cancel** button to abort the operation.

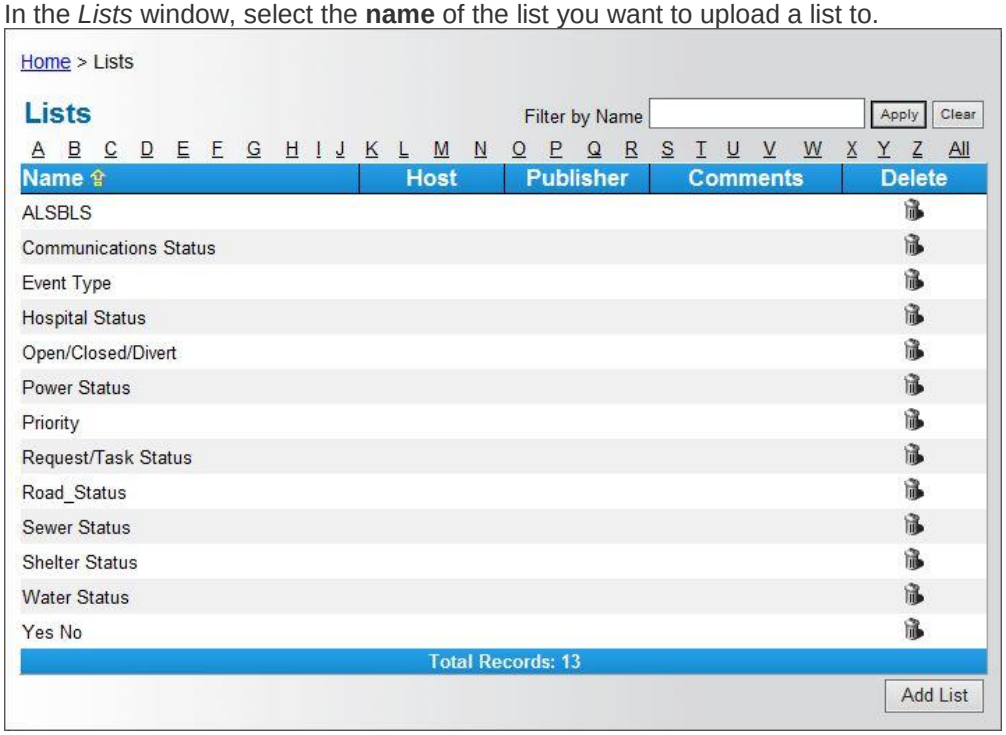
Importing a List

If you already have a list, you can import it into WebEOC. The file must be a comma separated value (CSV) file. The icon below is an example of a CSV file.

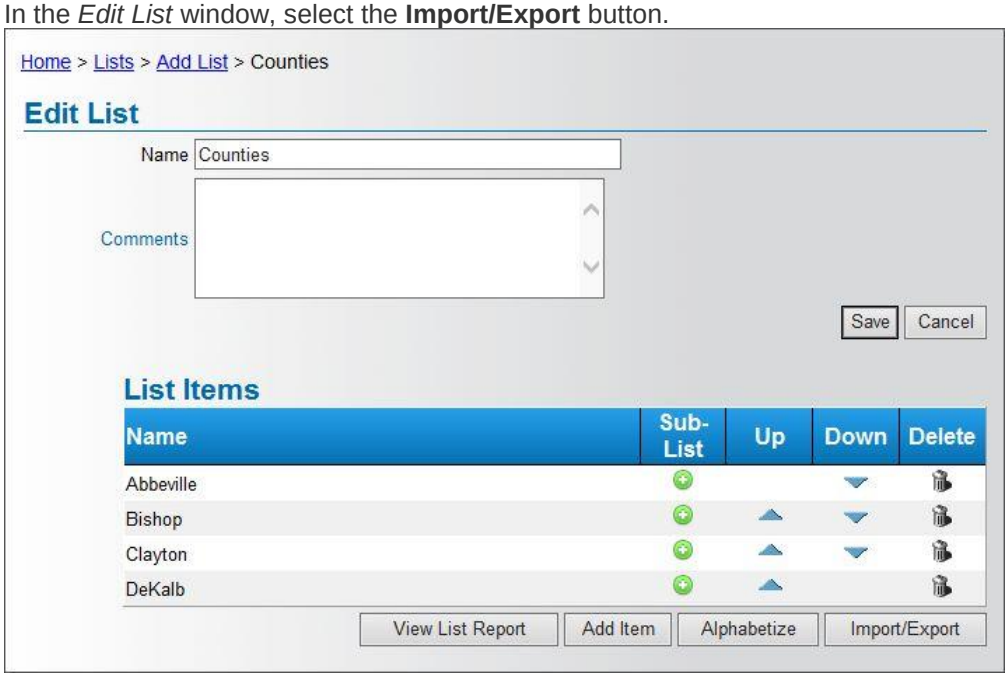
To import a CSV file, follow the steps below.

1. Select the **Lists** link in the *Process* section of the admin window.

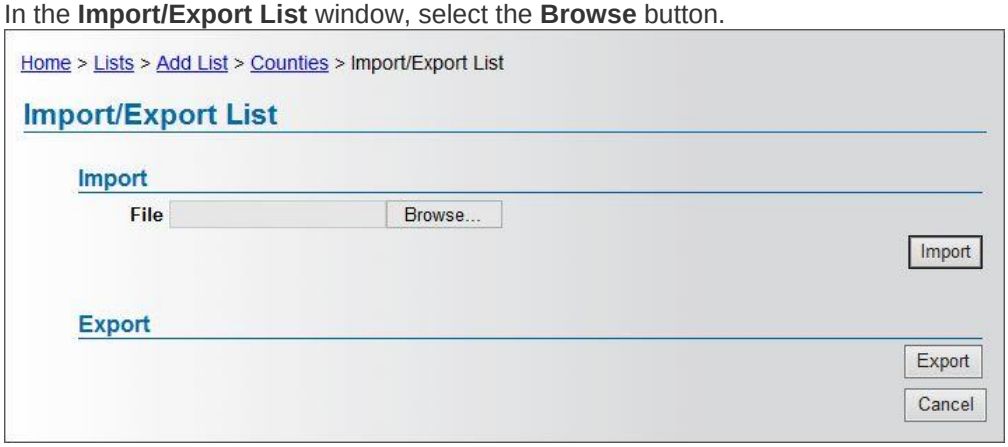
2. In the *Lists* window, select the **name** of the list you want to upload a list to.



3. In the *Edit List* window, select the **Import/Export** button.



4. In the **Import/Export List** window, select the **Browse** button.



5. Locate your file, and select the **Open** button.

6. The *File* field will populate with the location of your file. Select the **Import** button. The *Edit List* window will appear with the *List* Items section populated from your file.

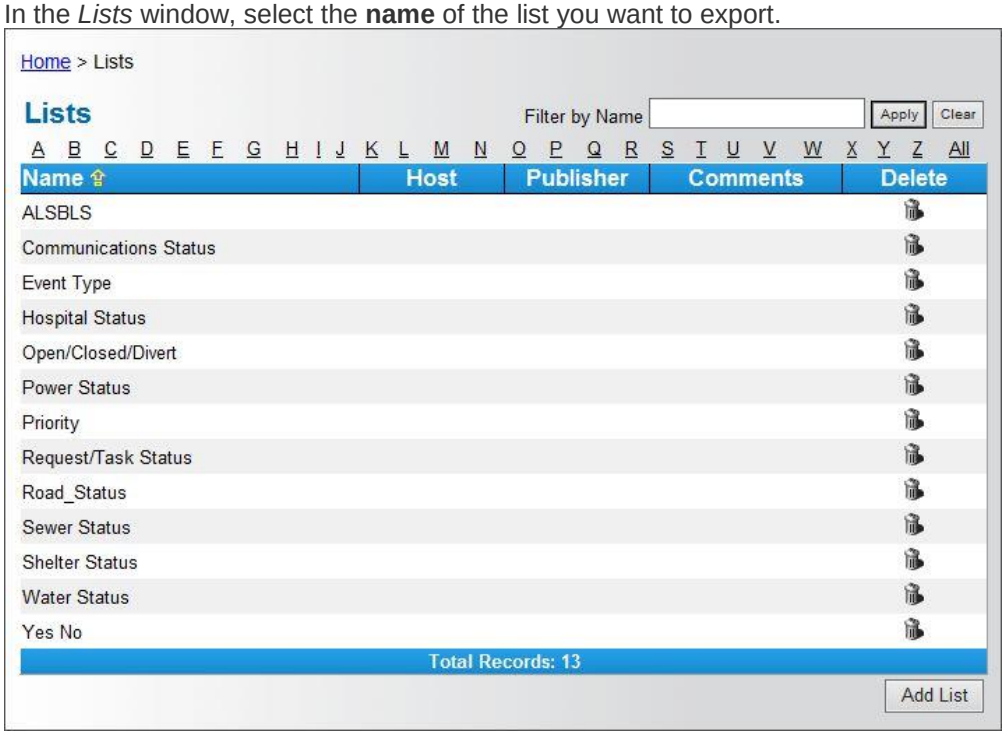
Exporting a List

You can also export lists from WebEOC and share them with other agencies.

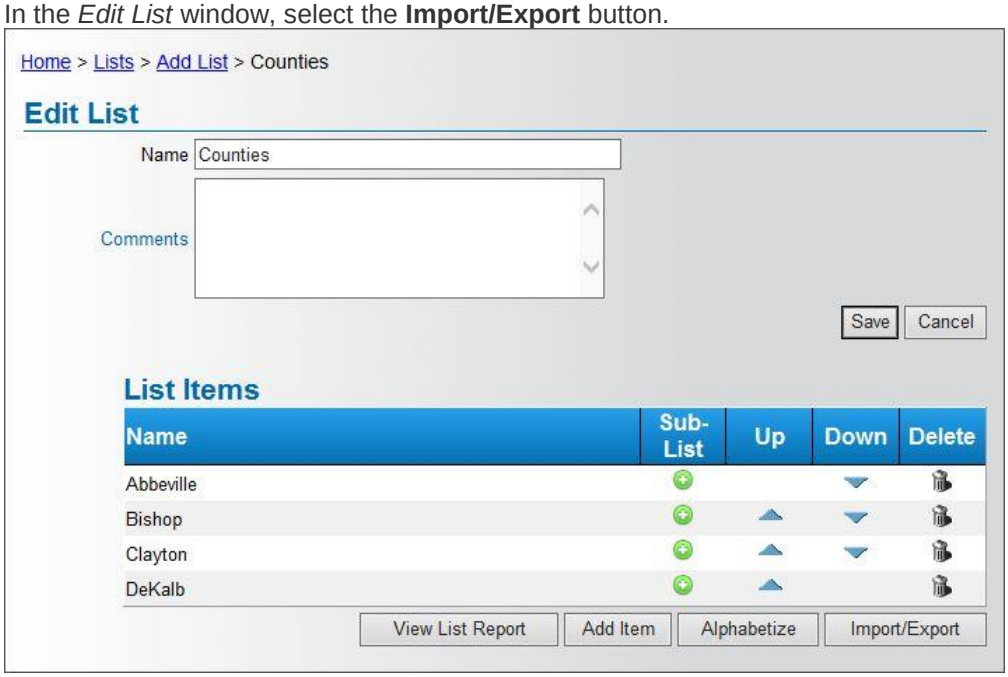
To export a list from WebEOC, follow the steps below.

1. Select the **Lists** link in the *Process* section of the admin window.

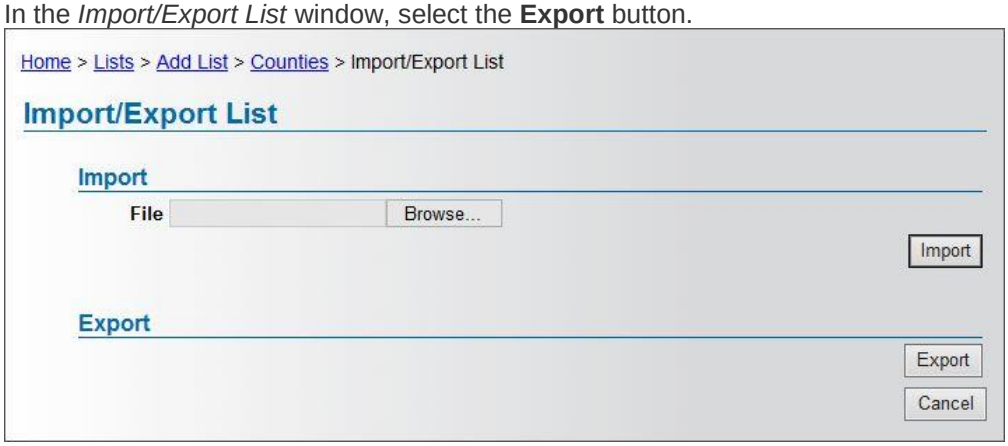
2. In the *Lists* window, select the **name** of the list you want to export.



3. In the *Edit List* window, select the **Import/Export** button.



4. In the *Import/Export List* window, select the **Export** button.



5. When the *File Download* window appears, select the **Save** button to save the file to your computer, or select the **Cancel** button to abort the operation.

File Download
Do you want to open or save this file?
Name: list.csv
Type: Microsoft Office Excel Comma Separated Values Fil...
From:
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

6. Select a **location** to save the file, and select the **Save** button. When the *Download Complete* window appears, select the **Close** button.

The Menus Manager

You can use the *Menus* manager to group and display boards, plug-ins, links, and other menus under a single link on the control panel. When the link is selected, assigned items will open in a new window that is similar in appearance and functionality to the control panel.

As each board, link, plug-in, or menu is added to the menu, access permissions must be assigned to each in the same way as group permissions are assigned. Users assigned to a group that provides access to the menu will inherit the permissions established for the menu.

For example, a menu called *Resources* includes the Resources Board (Read/Write permissions), File Library (View Only) and MapTac (Edit Markers or View Only). The *Resources* menu is added to the Logistics group . Any user who is a member of Logistics has access to the *Resources* menu with the permissions assigned during menu setup.

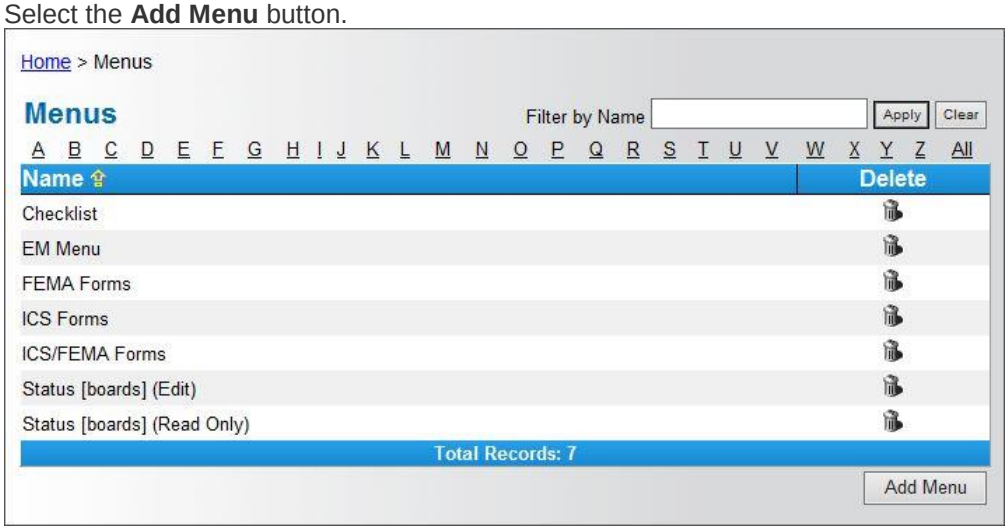
Menu items are grouped together on the control panel appended with a double-arrow icon. Sub-menus are accessed by selecting the menu title (which acts as a link). Menus are closed by selecting the **X** button next to the menu title. Once a sub-menu is open, the **X** will appear in red to confirm the menu is active. If a menu contains a board, the board link on the sub-menu and the link on the control panel will change to red when new information has been posted to the board. This will prompt the user to open the menu. When the board is opened, the board link will turn from red to black, assuming there is no new data on other boards that may be assigned to the menu.

Adding a Menu

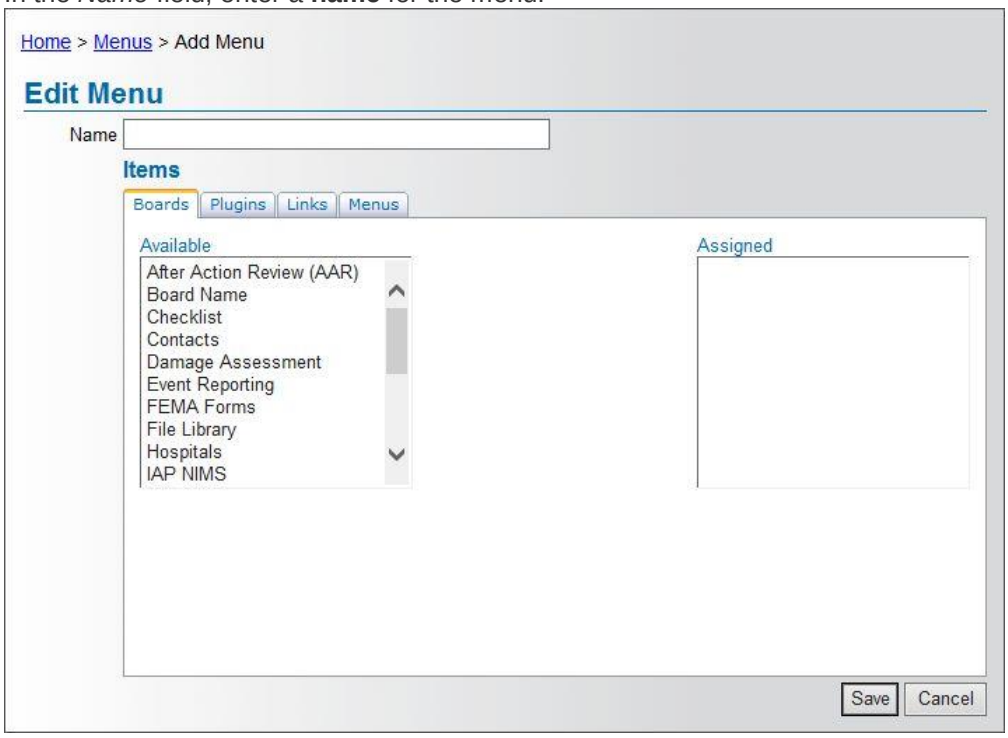
To add a menu, follow the steps below.

1. Select the **Menus** link in the *Process* section of the admin window.

2. Select the **Add Menu** button.



3. In the *Name* field, enter a **name** for the menu.



4. In the *Boards* tab, select a **board** from the *Available* list.

5. When the settings appear between the *Available* and *Assigned* lists, you have the option to rename the label in the *Label* field.

6. Select the **input view** you want to appear from the *Input* drop-down list.

7. Select the **display view** from the *Display* drop-down list.

8. Select the **check box** next to any filters you want to appear in the *View Filters* section.
9. Select the **permissions** from the *Permission* drop-down list.
10. When you have finished configuring settings for the board, select the **right arrow** to move the board to the *Assigned* list.
11. Select the **Plugins** tab to assign plug-ins to this menu.
12. Select the **right arrow** to move the plug-in to the *Assigned* list. You can rename a plug-in as it appears in the menu in the *Label* field. (optional)
13. Select a **permission** from the Permission drop-down list.
    a. *Restricted* allows users to add new contacts, modify contacts that they have added, and view contacts set as **Do not hide from restricted users** in the *Contacts* plug-in. Contacts set as **Hide from restricted users** will not display in the *Contacts* list for users given restricted permissions.
    b. *All* gives users full access and capability to add new contacts, modify contacts they have entered, and view contacts designated as either **Hide from restricted users** or **Do not hide from restricted users**.

Note: "Hide from restricted users" and "Do not hide from restricted users" settings are configured in the Contacts plug-in.

14. Select the **Links** tab.
15. Select the **right arrow** to move the link to the *Assigned* list. You can rename a link in the *Label* field. (optional)
16. Select the **Menus** tab.
17. Select the **right arrow** to move a menu to the *Assigned* field. You can rename the menu in the *Label* field. (optional)
18. Select the **Save** button to save the menu, or select the **Cancel** button to abort the operation.

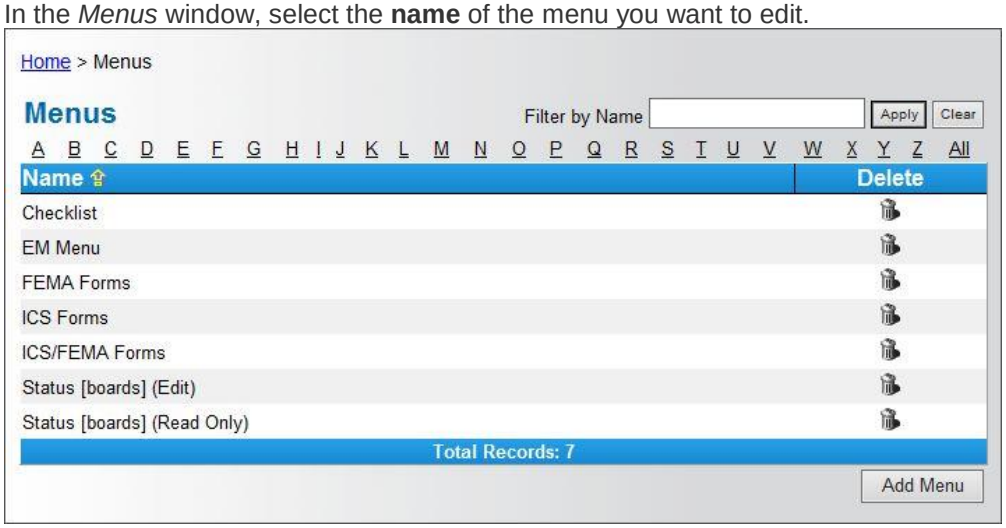
Note: After you add a new menu you need to set access privileges to it. Access privileges are set in the Groups manager. See the Users topic for detailed instructions on setting group permissions.

Editing a Menu

To edit a menu, follow the steps below.

1. Select the **Menus** link in the *Process* section of the admin window.

2. In the *Menus* window, select the **name** of the menu you want to edit.



3. In the *Edit Menu* window, make your changes.

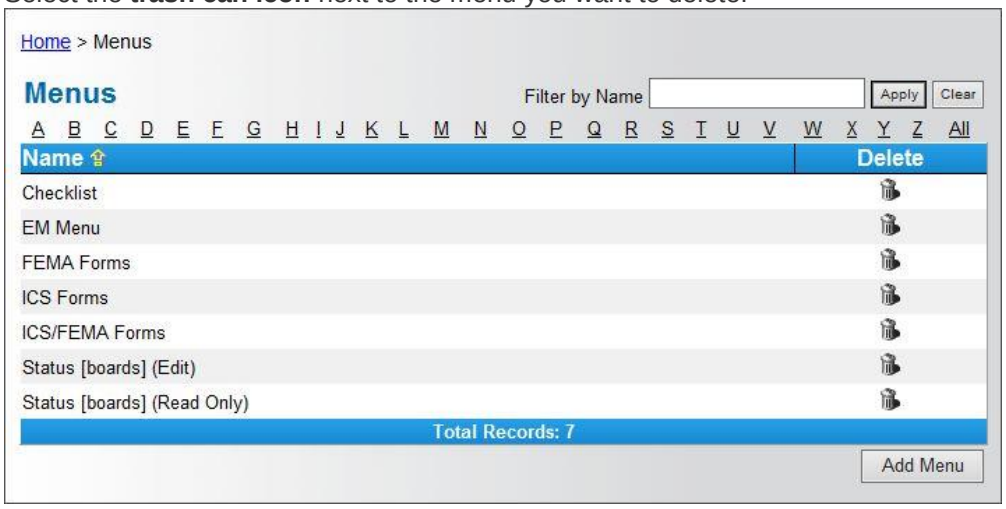
4. Select the **Save** button to save your changes, or select the **Cancel** button to abort the operation.

Deleting a Menu

To delete a menu, follow the steps below.

1. Select the **Menus** link in the *Process* section of the admin window.

2. Select the **trash can icon** next to the menu you want to delete.



3. When the delete confirmation dialog box appears, select the **OK** button to delete the menu, or select the **Cancel** button to abort the operation.

Note: When a menu is deleted, it will also be removed from the Groups manager.

System

The Admin Profiles Manager

You use the *Admin Profiles* manager to control access to administrator functions in WebEOC. You can turn specific configuration permissions on and off for specific users and create sub-administrators. Sub-administrators can perform only those administrative tasks that you enable. This allows non-system administrators some degree of administrator privileges in order to help them fulfill their job duties in the EOC (for example, creating and/or editing user accounts).

You can grant system permissions based on the need and permission level required. For example, a profile could allow a group to manage users for their agency by assigning selected permissions to the Users and Groups managers only, while a different set of administrator permissions to build boards and checklists are defined and applied through another profile.

Similarly, as members of the controller organization, “User A” is responsible for building drill scenarios while “User B” conducts emergency management training. While job responsibilities require both have access to the Simulator manager, specific permissions based on need can be assigned allowing “User A” full permissions to edit, delete, run, and export simulations, while “User B” is only allowed to run the simulator. In turn, “User A” can assign permissions to other users that are equal to or less than his or her own. “User B” can only assign “run” permissions to another user.

Users that are designated WebEOC administrators (through the Users manager) have full system access and configuration authority regardless of permissions assigned through the *Admin Profiles* manager.

Planning an Admin Profile

Before adding an admin profile, consider the following points in determining specific permissions the profile will grant.

- What permissions should be enabled for each manager assigned (i.e., edit, delete, clear, search, run, export, unlock, etc.).
- Is there an existing profile with the proper permissions that will meet the needs of the user, or does a new admin profile need to be created?

When adding and editing an admin profile, consider the following points.

- If you want the sub-administrator to maintain the capability to access the profile, he or she must be added as a user to the new admin profile.

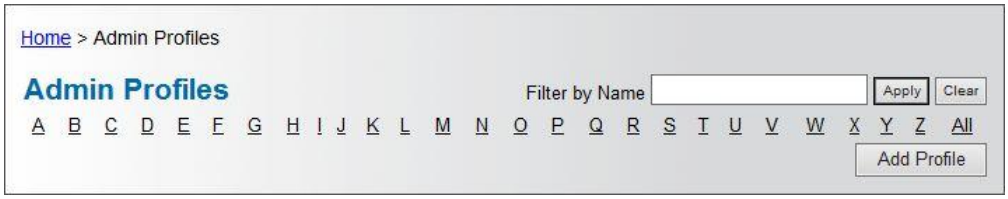
- An admin profile sub-administrator can exercise his or her assigned permissions to any profile to which he or she belongs, regardless of who created the profile.
- You can assign the same, or more restrictive privileges, to users assigned to the profile; users cannot elevate their assigned permissions within the admin profile.
- In order for the Admin link to appear on the control panel, a user must belong to at least one admin profile.
- Belonging to an admin profile does not give you access to the Admin Profiles manager —only the manager or managers you have been given rights to.

Adding an Admin Profile

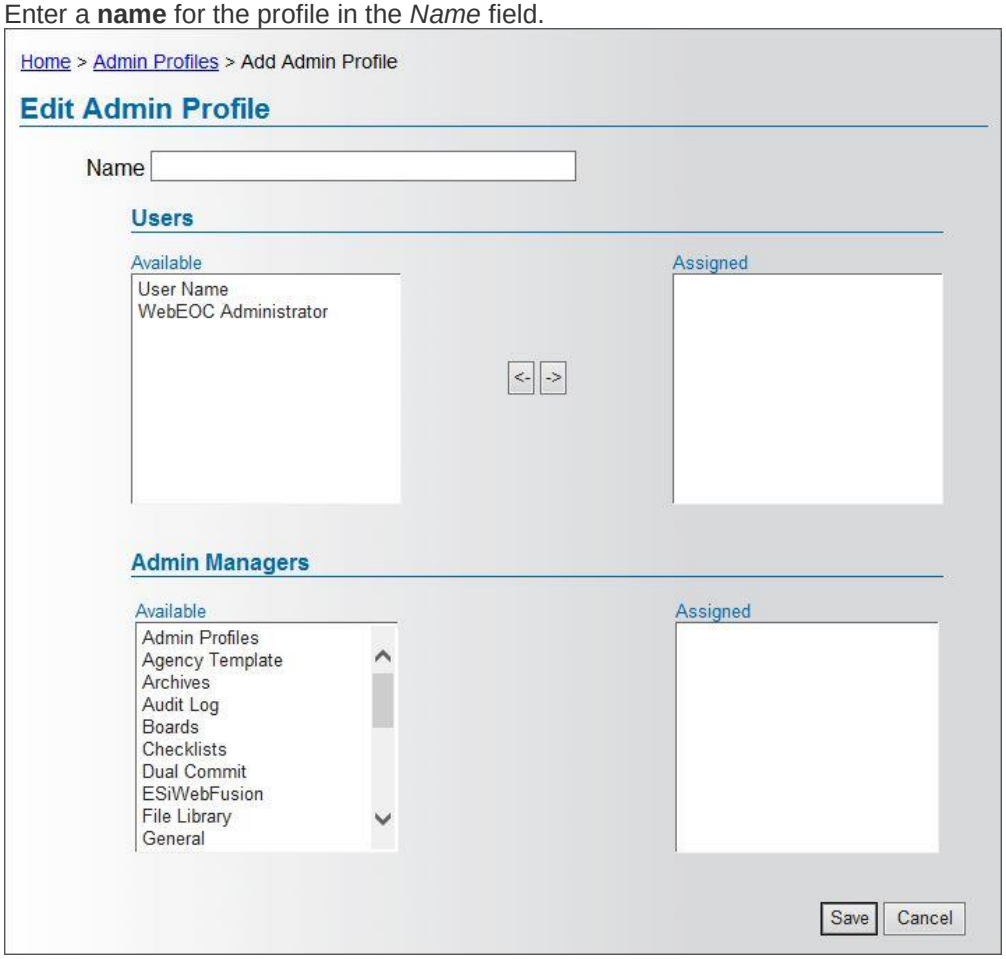
When adding a new admin profile, you should add yourself as a user to the profile if you want the ability to access the profile.

To add a new admin profile, follow the steps below.

1. Select the **Admin Profiles** link in the *System* section of the admin window.
2. Select the **Add Profile** button.



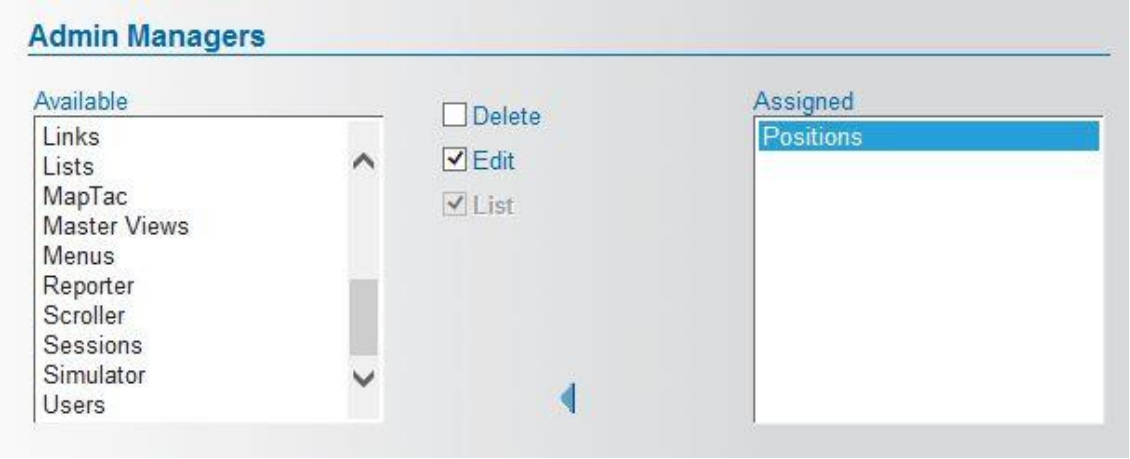
3. Enter a **name** for the profile in the *Name* field.



4. Assign a user or users to the admin profile by selecting the **user** from the *Available* list, and selecting the **right arrow** to move the user to the *Assigned* list.

5. Assign admin managers and set permissions to those managers by selecting the **manager** from the *Available* list. When the permissions available for that manager appear, select the **check box** next to the function you want to allow.

Note: The List permission is automatically selected for most admin managers. It cannot be deselected. To remove a manager from the profile, select the manager in the Assigned list, and select the left arrow. The manager is moved back to the Available list. Sub-administrators will only have access to the admin managers and permissions that they have been assigned. Sub-administrators cannot elevate their permissions to another profile. Users assigned WebEOC administrator privileges through the Users manager have full configuration permissions in the Admin Profiles manager and therefore override any permissions set in the Admin Profiles manager. A sub-administrator will only be able to see those permissions that have been assigned. Unless his or her user account has been assigned WebEOC administrator privileges, he or she will be able to enable and/or disable all permissions for all managers.



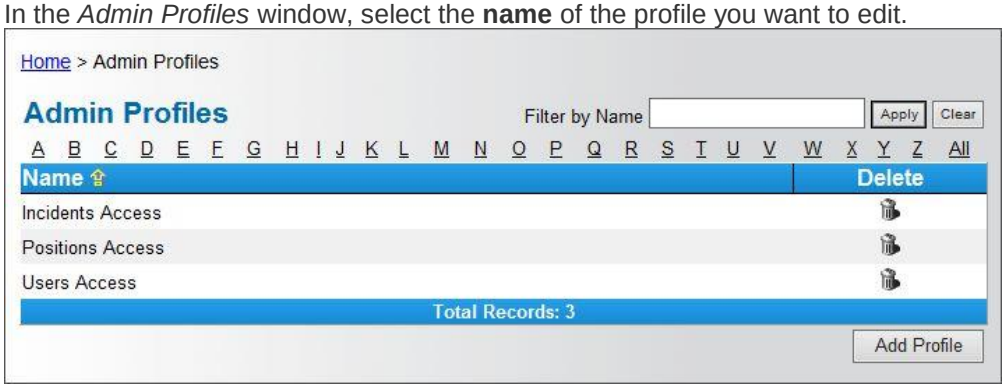
6. Select the **Save** button to save the admin profile, or select the **Cancel** button to abort the operation.

Editing an Admin Profile

To edit an admin profile, follow the steps below.

1. Select the **Admin Profiles** link in the *System* section of the admin window.

2. In the *Admin Profiles* window, select the **name** of the profile you want to edit.



3. Make your changes in the *Edit Admin Profile* window.

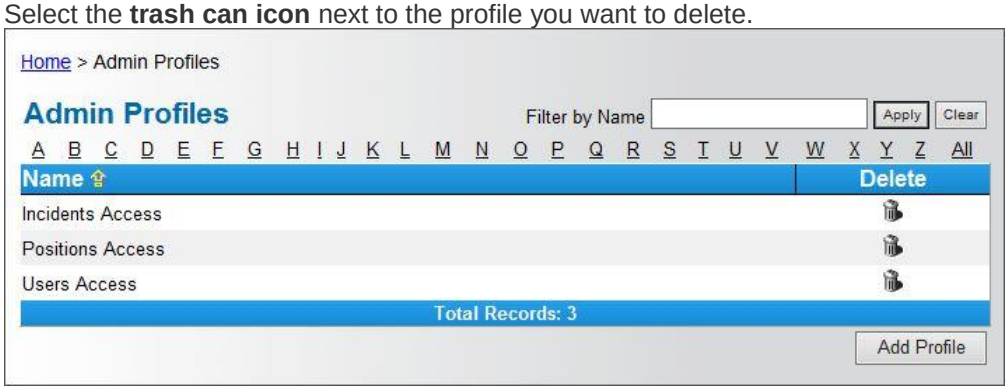
4. Select the **Save** button to save your changes, or select the **Cancel** button to abort the operation.

Deleting an Admin Profile

To delete an admin profile, follow the steps below.

1. Select the **Admin Profiles** link in the *System* section of the admin window.

2. Select the **trash can icon** next to the profile you want to delete.

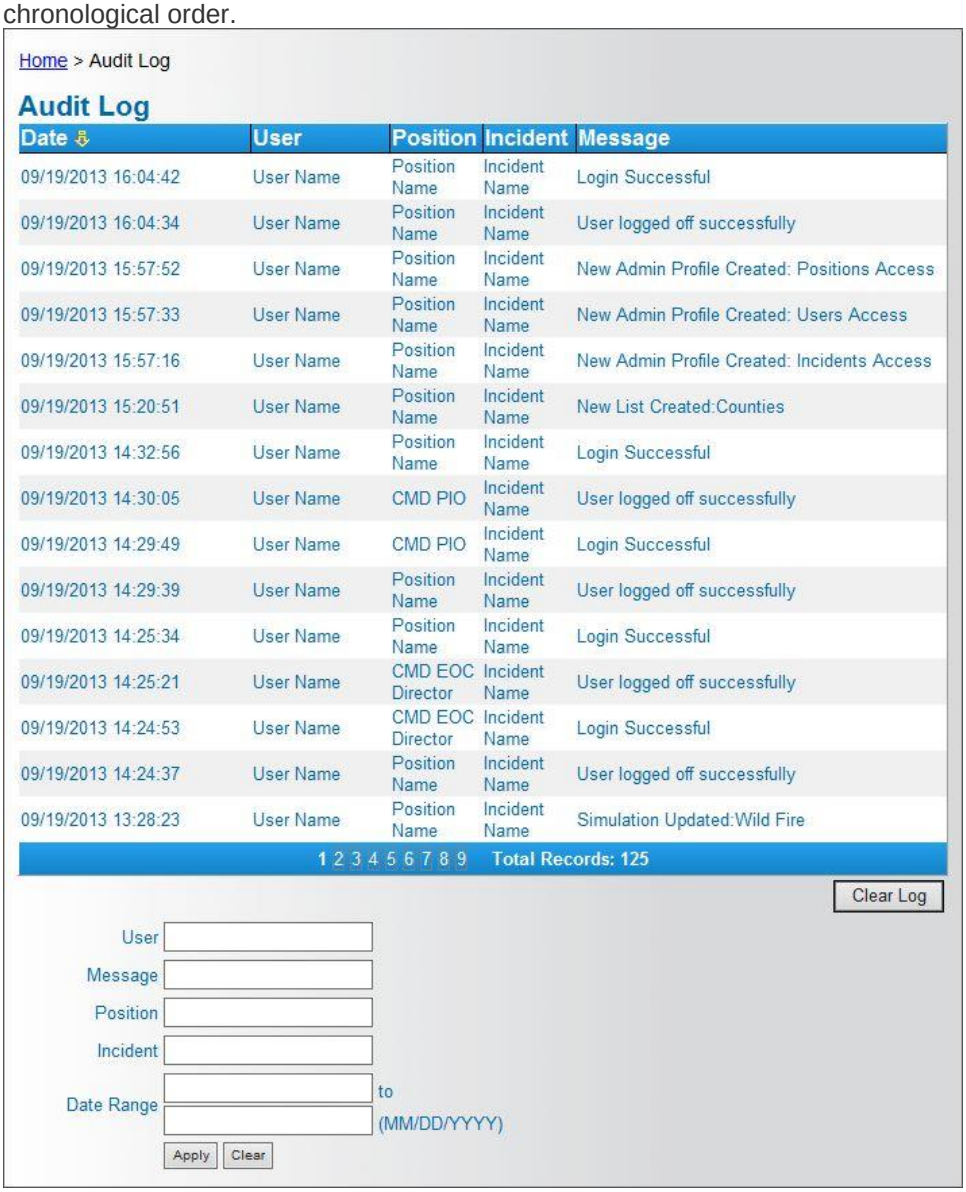


3. When the confirmation dialog box appears, select the **OK** button to delete the selected admin profile, or select the **Cancel** button to abort the operation.

The Audit Log Manager

The *Audit Log* tracks, records, and displays administrative events that have occurred in the WebEOC system. This information allows you to monitor, assess, and troubleshoot system activities. You can search the *Audit Log* based on user, message, position, incident, and date range or a combination of those.

Examples that are recorded in the *Audit Log* include successful and/or failed logins, forced logouts, account lockouts, and add/delete/update actions performed in an admin window. The date/time, user, position (if configured), and a brief synopsis of the action is provided and displayed in descending chronological order.


Home > Audit Log
Audit Log
Date
User
Position
Incident
Message
09/19/2013 16:04:42 User Name Position Name Incident Name Login Successful
09/19/2013 16:04:34 User Name Position Name Incident Name User logged off successfully
09/19/2013 15:57:52 User Name Position Name Incident Name New Admin Profile Created: Positions Access
09/19/2013 15:57:33 User Name Position Name Incident Name New Admin Profile Created: Users Access
09/19/2013 15:57:16 User Name Position Name Incident Name New Admin Profile Created: Incidents Access
09/19/2013 15:20:51 User Name Position Name Incident Name New List Created:Counties
09/19/2013 14:32:56 User Name Position Name Incident Name Login Successful
09/19/2013 14:30:05 User Name CMD PIO Incident Name User logged off successfully
09/19/2013 14:29:49 User Name CMD PIO Incident Name Login Successful
09/19/2013 14:29:39 User Name Position Name Incident Name User logged off successfully
09/19/2013 14:25:34 User Name Position Name Incident Name Login Successful
09/19/2013 14:25:21 User Name CMD EOC Director Incident Name User logged off successfully
09/19/2013 14:24:53 User Name CMD EOC Director Incident Name Login Successful
09/19/2013 14:24:37 User Name Position Name Incident Name User logged off successfully
09/19/2013 13:28:23 User Name Position Name Incident Name Simulation Updated:Wild Fire
1 2 3 4 5 6 7 8 9 Total Records: 125
Clear Log
User
Message
Position
Incident
Date Range
to
(MM/DD/YYYY)
Apply
Clear

The *Audit Log* can be purged to permanently delete all information.

You can obtain data entry and entry update actions in a status board by generating a report through the *Reporter* manager. See the *Incidents* topic for detailed instructions on using *Reporter*.

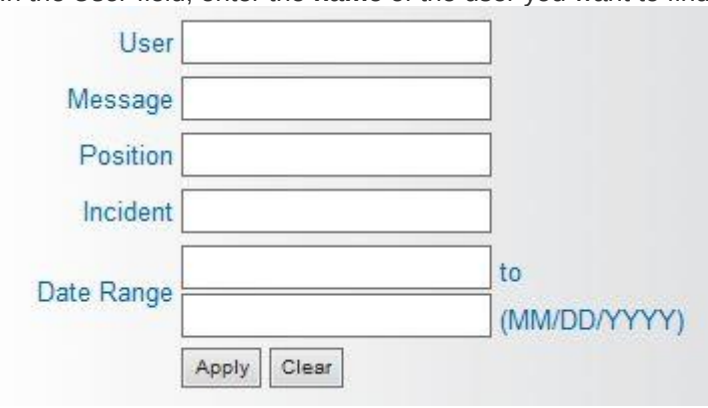
Viewing and Sorting the Audit Log

By default, the audit log is sorted in descending, chronological order. It can be sorted in ascending or descending order by selecting the desired column heading (*Date*, *User*, *Position*, *Incident*, or *Message*). You can also select the numbers in the bottom banner of the *Audit Log* window to quickly navigate through the list.

Searching the Audit Log

To search and display specific audit log events, follow the steps below.

1. Select the **Audit Log** link in the *System* section of the admin window.
2. In the *Audit Log* window, enter **search criteria** in the following search fields as applicable. Partial searches can be performed on a field.
    a. In the *User* field, enter the **name** of the user you want to find log entries for.



    b. In the *Message* field, enter **text** that is contained within the event description.
    c. In the *Position* field, enter the **position** you want to search for.
    d. In the *Incident* field, enter the **incident name** that the user was logged in to when the action was executed.
    e. In the *Date Range* fields, the following formats may be used when including date criteria in the search. Enter the from date in the first field, and the to date in the second field.

US date formats:

- mm/dd/yyyy (for example, 05/27/2010)
- [Month] [Day], [Year] (for example, May 27, 2010)

International date formats:

- dd/mm/yyy (for example, 27/05/2010)
- [Day] [Month] [Year] (for example, 27 May 2010)

3. When you have entered data in any or all of the fields, select the **Apply** button. Audit log events matching the values specified in the search will appear. To remove search filters, select the **Clear** button at any time. This clears the search criteria fields and resets the entry list to display the entire audit log.

Clearing the Audit Log

Warning: Clearing the audit log permanently removes all events currently residing in the log from the WebEOC database, and event information cannot be retrieved.

To clear the audit log, follow the steps below.

1. Select the **Audit Log** link in the *System* section of the admin window.
2. Select the **Clear Log** button.
3. When the confirmation dialog box appears, select the **OK** button to permanently delete the audit log, or select the **Cancel** button to abort the operation.

Windows Internet Explorer
Are you sure you want to clear the log? All audit information will be deleted permanently.
OK
Cancel

The ESiWebFusion Manager

If your agency uses *ESiWebFusion*, you can configure and manage that feature using the *ESiWebFusion* manager. See the *ESiWebFusion Manual* for detailed instructions for this feature.

The General Manager

The *General* manager allows you to configure several system options and set a number of security policies for WebEOC. Options configured in the *General* manager will be applied to all WebEOC user accounts.

Accessing the General Manager

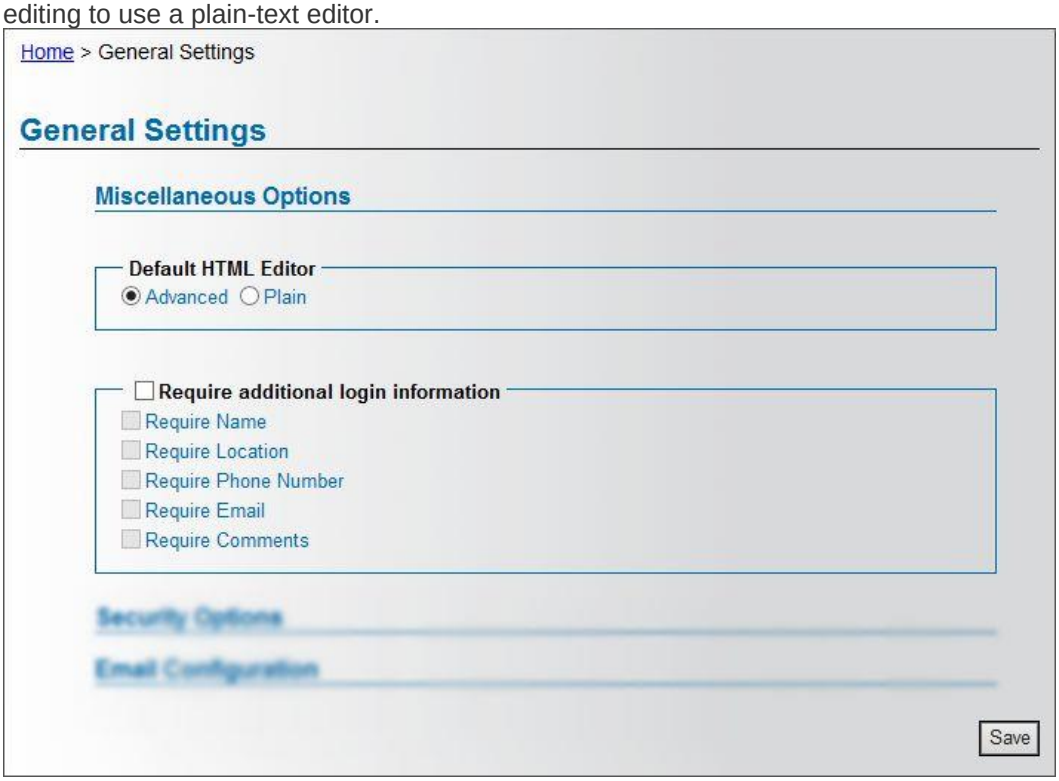
To access the General manager, follow the steps below.

1. Select the **General** link in the *System* section of the admin window.
2. In the *General Settings* window, configure the required settings. For detailed information on the features located in this manager, see the topics that follow.
3. When you have finished configuring setting in the *General Settings* window, select the **Save** button to save your settings.

General Manager Miscellaneous Options

Default HTML Editor

By default WebEOC is set to use the *Advanced HTML* editor, which has features like syntax highlighting and auto-completion. Administrators can select the **Plain** radio button to set the default for all HTML editing to use a plain-text editor.

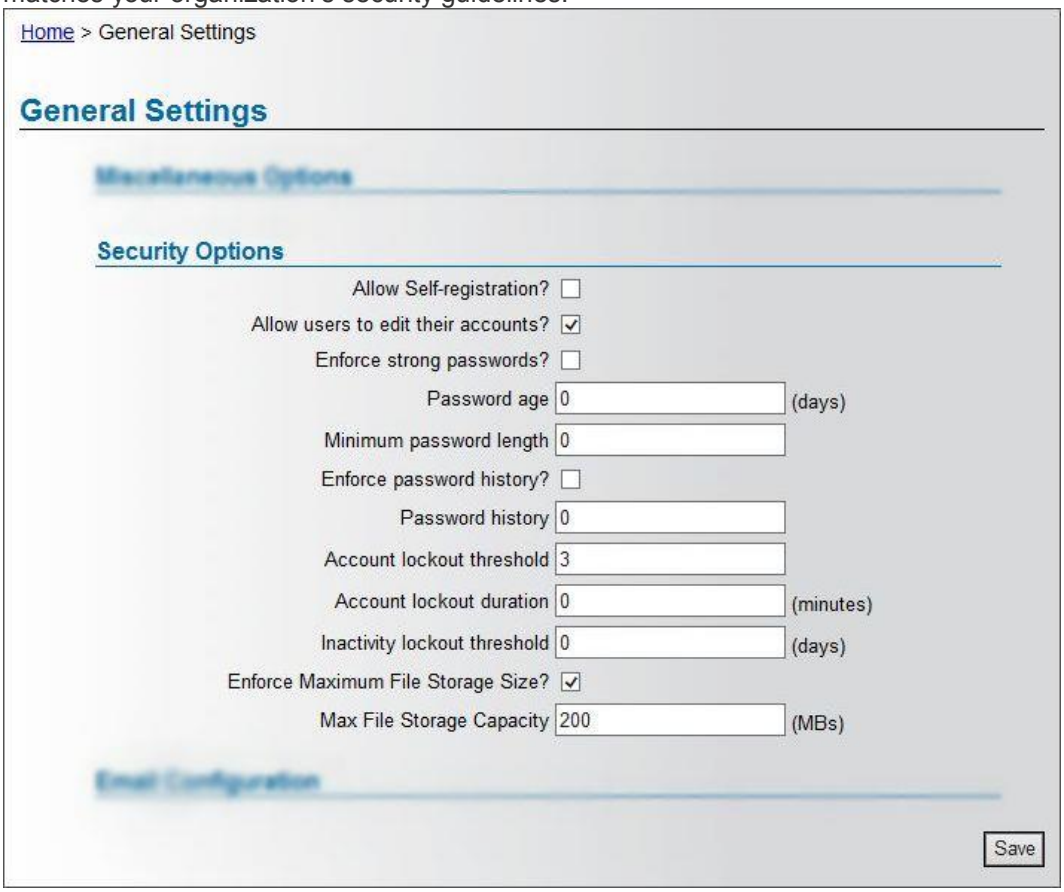


Require Additional Login Information

If the **Require additional login information?** check box is selected, you can set additional options that users are required to provide during the login process. These details could be name, location, email address, phone number, and/or comments. When enabled, data entered during the login can be accessed in the *Sessions* manager and viewed for the duration of the user's session. A WebEOC board may also be configured to utilize this data.

General Manager Security Options

The *Security Options* section in the *General* manager enables you to configure WebEOC in a manner that matches your organization's security guidelines.



In addition to the security features outlined in this section, it is strongly recommended that you implement a Secure Socket Layer (SSL). This ensures that data is encrypted during the data transfer. See your system administrator or hosting provider to set up this feature.

You should also consider enabling Windows® authentication. This allows you to identify and validate the identity of users accessing WebEOC. See your system administrator or hosting provider to set up this feature.

Allow Self-registration

This feature enables users to self-register and set up their own user accounts in WebEOC. When you activate this feature, a "New User? Click here to create an account." link appears in the WebEOC Login window.

Then self-registration is activated, the *Forgot User Name/Password* link becomes available. This can be used to email a user their user name if they have forgotten it, or a link to change their password if they have forgotten that.

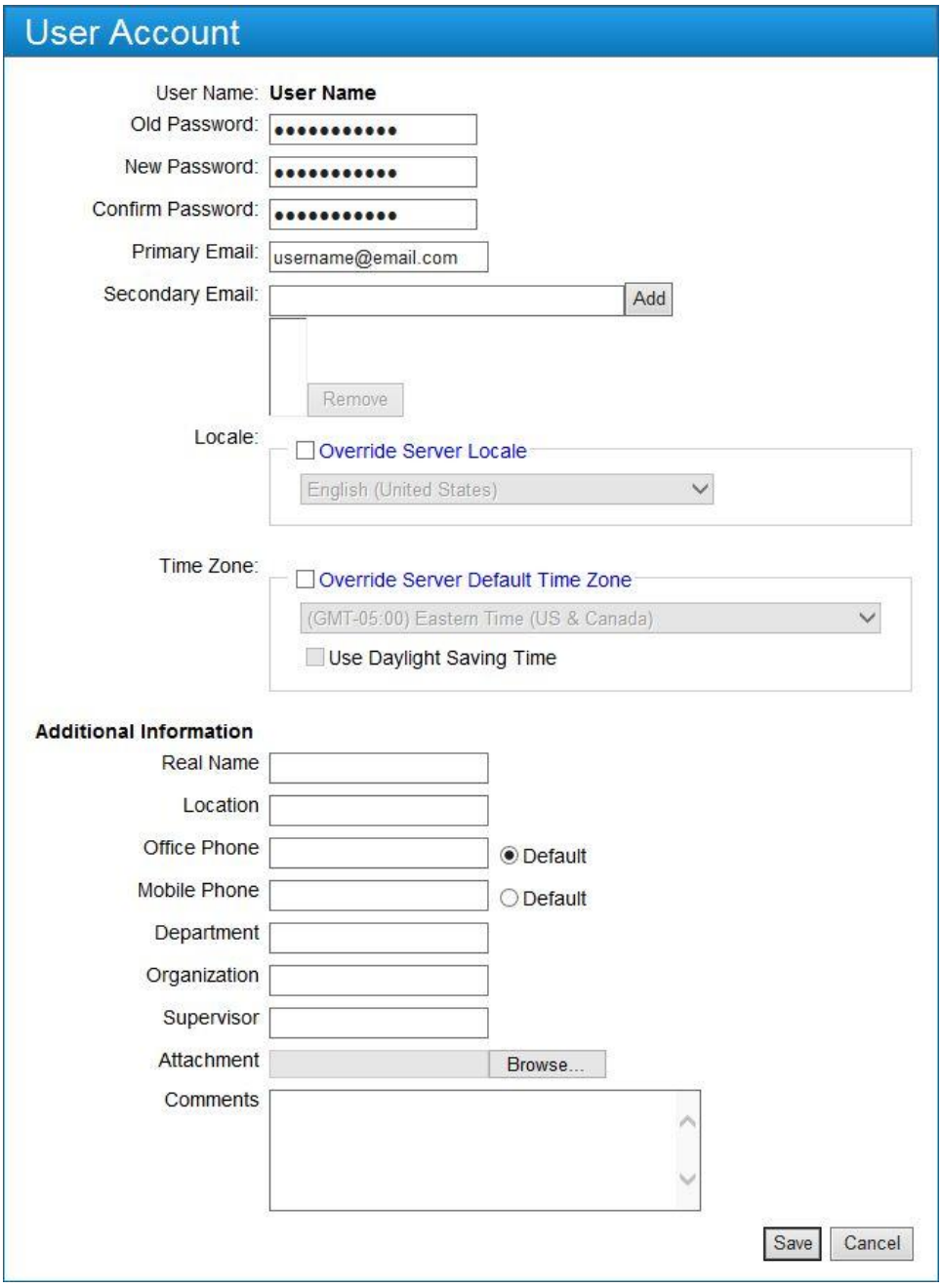
Note: If you enable the self-registration feature, you must provide your users with a position name and a position access code (PAC). PACs are configured in the Positions manager. See the Users topic for detailed instructions on creating PACs.

Allow Users to Edit Their Accounts

Administrators can allow WebEOC users to edit and maintain their own user accounts.

If this feature is not enabled, the account name appears as static information on the control panel and all changes to user accounts must be performed by a system administrator. When selected, the user account name appears as a link on the control panel.

Selecting the link opens the *User Account* edit window. When enabled, users can update their own account information (for example, password and email address) alleviating the administrator's burden to update user accounts with current information. Users can also add data to the *Additional Information* section. This feature does not allow users to change their assigned permissions or access privileges.



Enforce Strong Passwords

If enabled, user passwords must meet the requirements for a strong password. A strong password must contain at least one upper case letter, at least one lower case letter, and at least one number. We recommend enabling this feature.

Password Age

This feature sets the number of days a password will be valid before it expires. When the number of days is exceeded and the password expires, the user will be required to change it during his or her next login attempt. When set to zero, passwords will not expire. We recommend setting the password age to 180 days.

Minimum Password Length

User passwords can be set to require a specified character length. Setting the character length to zero removes the character count requirement. We recommend setting the password length to a minimum of 8 characters.

Enforce Password History

This security setting determines the number of unique new passwords that have to be associated with a user account before an old password can be reused. If enabled, user passwords cannot be reused for the specified number of times configured in the password history field.

Password History

If the **Enforce password history**? check box is selected, you can set the number of different passwords a user must exhaust before he or she is allowed to repeat a particular password in the password history field. For example, if Password history is set to 3, the first password may not be reused until three different passwords have been used.

Account Lockout Threshold

You can set the number of failed login attempts allowed before an account is locked using the account lockout threshold field. Setting the threshold to zero will allow an unlimited number of login attempts. As the administrator, you can log in to WebEOC and manually unlock a user account. We recommend setting this to 3.

Note: The built-in WebEOC administrator account cannot be locked, regardless of the threshold value.

Account Lockout Duration

After the lockout threshold is exceeded and the account is locked, this option sets the amount of time that must elapse before the system will process another login attempt. Setting the duration to zero minutes will lock the account until it is manually unlocked by an administrator. We recommend setting this to 30 minutes.

Inactivity Lockout Threshold

In this field, you can set the number of days an account can be inactive before it is locked.

If a user exceeds the inactive time period, the user cannot log in. If left blank or set to zero, the user account will remain active until the administrator manually disables or deletes the account.

Enforce Maximum File Storage Size

Use this feature to ensure the total disk space allotted for data files uploaded into the WebEOC database is limited to a specific number of megabytes. This includes files and attachments added through the File Library, MapTac, Messages, and status boards. We recommend you enable this feature.

Max Storage Size

If the option to enforce a maximum file storage size is selected, you can set the maximum storage disk space in megabytes that can be used to store uploaded files in the WebEOC database. We recommend setting the maximum storage capacity to 500 megabytes.

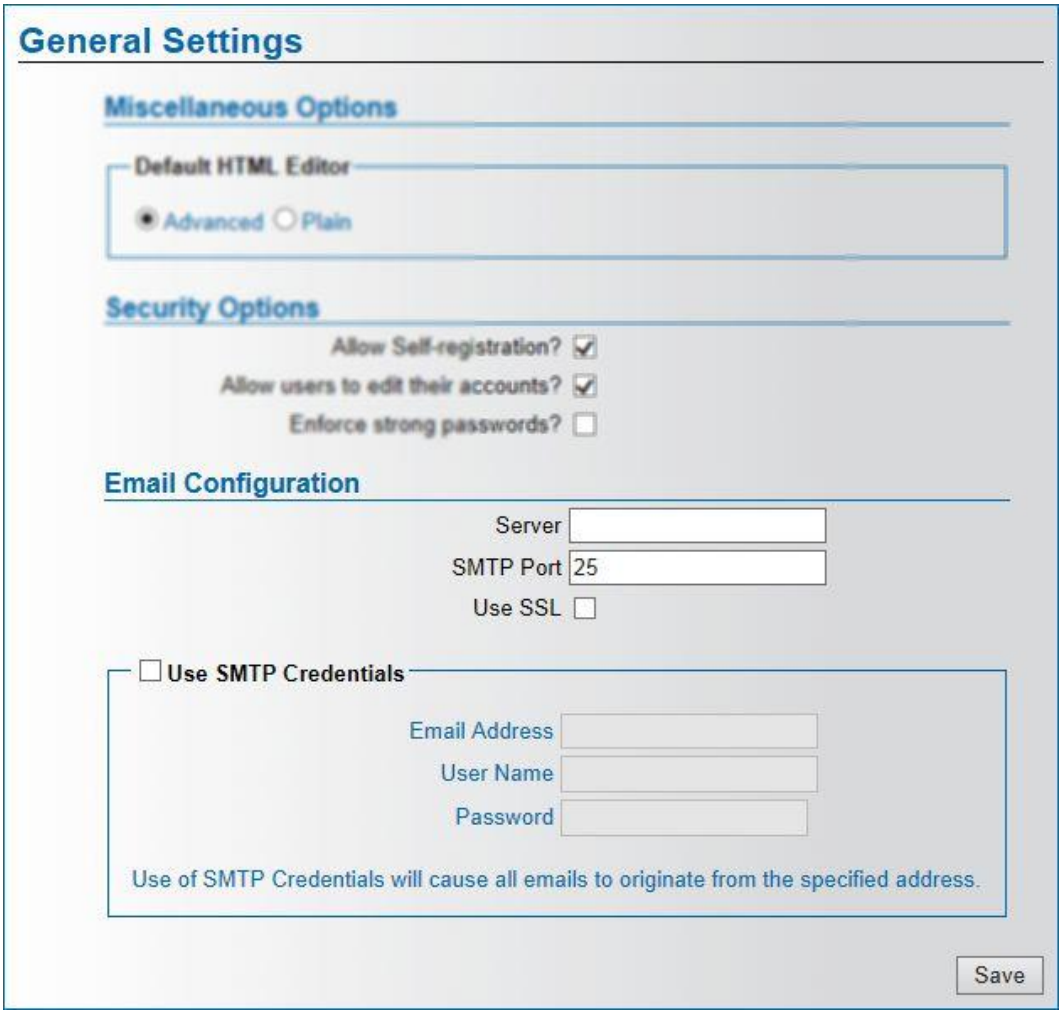
General Manager Email Configuration Options

Sending External Emails Using WebEOC

In order to send emails externally using WebEOC, you must:

- Enter a valid email address,
- Enter the IP address of the email server, and
- Configure the SMTP service. (You only have to configure an SMTP service if your email server does not have an SMTP service already installed.)

To configure your email server to send emails, enter the **host name** or **IP address** of your email server. The host name will look similar to this: companyname-exch.com. The IP address will look similar to this: 195.55.55.55.



Note: WebEOC can only send external emails; it cannot receive external emails.

After you configure the email server and the SMTP service, you can send emails via the *Messages* tool and any board that has been configured to send emails.

Any external email that is sent from a board within WebEOC will be addressed from the user's (primary or secondary) email account configured in the *Users* manager. Users will be able to send external emails from a board to any email account. An email sent from the *Messages* tool will be addressed from the sender (the user account used to log in to WebEOC).

Note: A user account must have an email address configured in order to send emails.

Use SMTP Credentials

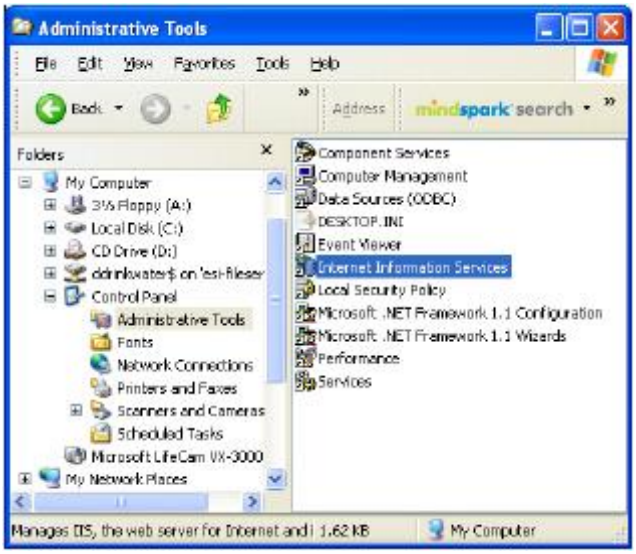
The *Use SMTP Credentials* check box enables you to provide an email address, user name, and password to the SMTP settings allowing for authenticated email sending.

Configuring Your SMTP Service to Send Emails

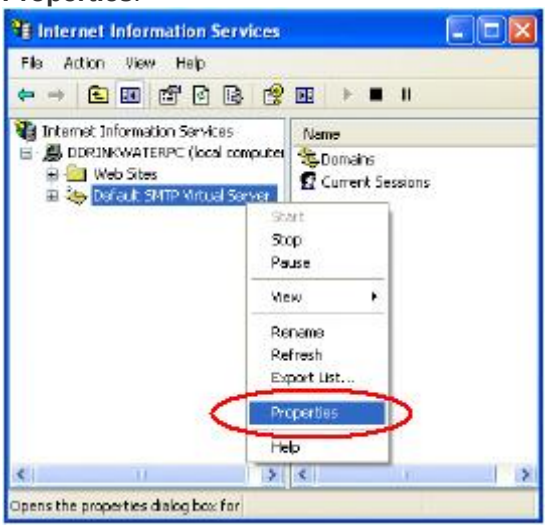
An SMTP service acts as a relay between WebEOC and other servers to send emails. In order for your SMTP service to send emails from WebEOC, you may need to include WebEOC's IP address in your allowed relay list. This list contains all of the IP addresses that will be allowed to send emails through your server. Adding WebEOC's IP address to your allowed list (while denying all other IP addresses) will also deny spammers the ability to utilize the server as an open relay. Follow the steps below if you are using the Microsoft® SMTP Service.

To configure your SMTP service to send emails, follow the steps below.

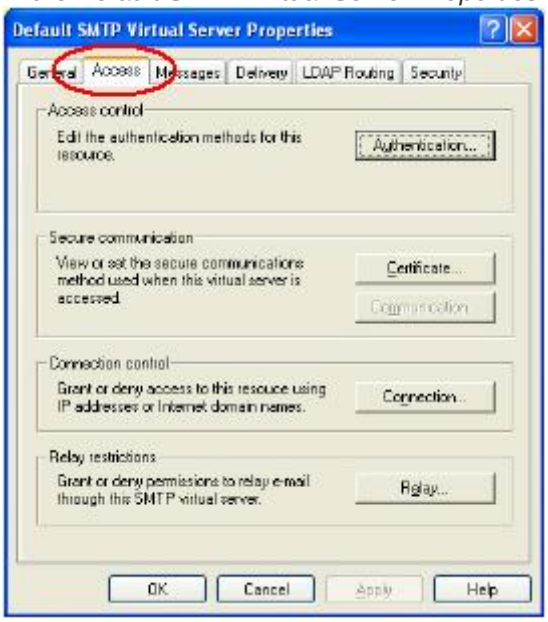
1. Go to **Start** | **Control Panel** | **Administrative Tools** | **Internet Information Services (IIS) Manager**.
2. Select **Internet Information Services**.



3. In the *Internet Information Services* window, right-click **Default SMTP Virtual Server**, and select **Properties**.

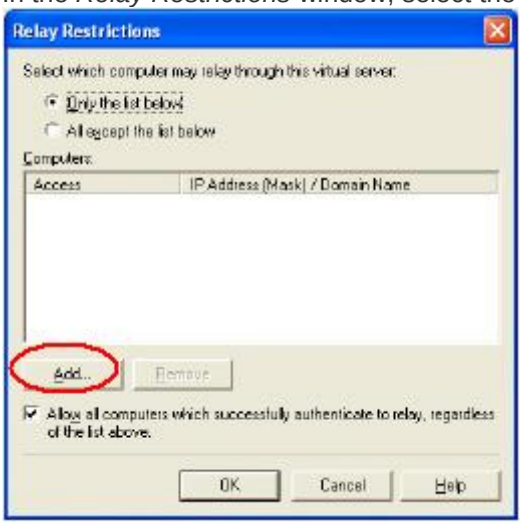


4. In the *Default SMTP Virtual Server Properties* window, select the **Access** tab.

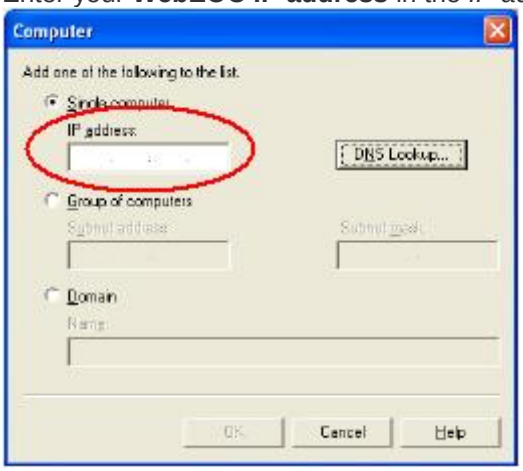


5. Select the **Relay** button in the *Relay restrictions* section.

6. In the *Relay Restrictions* window, select the **Add** button.



7. Enter your **WebEOC IP address** in the *IP address* field.



8. Select the **OK** button to save the IP address, or select the **Cancel** button to abort the operation.

Configuring Additional Email Servers

If you have an additional email server that stores email, calendars, folders, etc., see your network administrator for instructions on configuring the server.

Plug-ins

The Checklists Manager

The *Checklists* manager is a tool used to create automated checklists. For example, users who are required to perform specific tasks with multiple steps can use checklists to keep track of the steps that need to be performed.

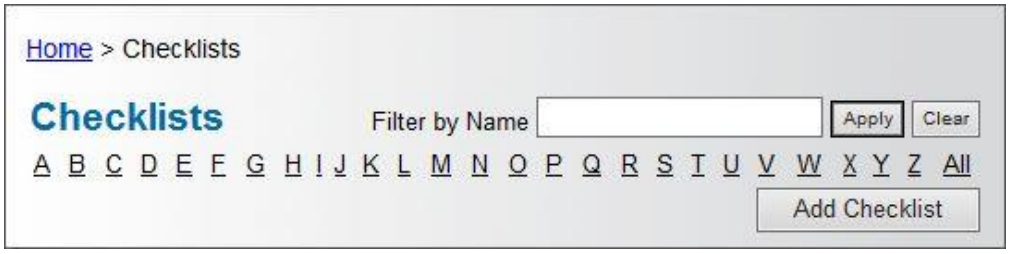
Checklist can contain main steps (numbered) or sub steps (lettered and/or numbered). You can assign completion times or ETimes for each step, and control which user groups have access to a specific checklist. If you set up steps with an ETime, the steps will turn red on the user side when the due time to perform them has passed. See the *WebEOC User Manual* for detailed instructions.

Use the *Groups* manager to enable users to access *Checklists* from the control panel. Checklists will appear as a link in the *Tools* section of the control panel.

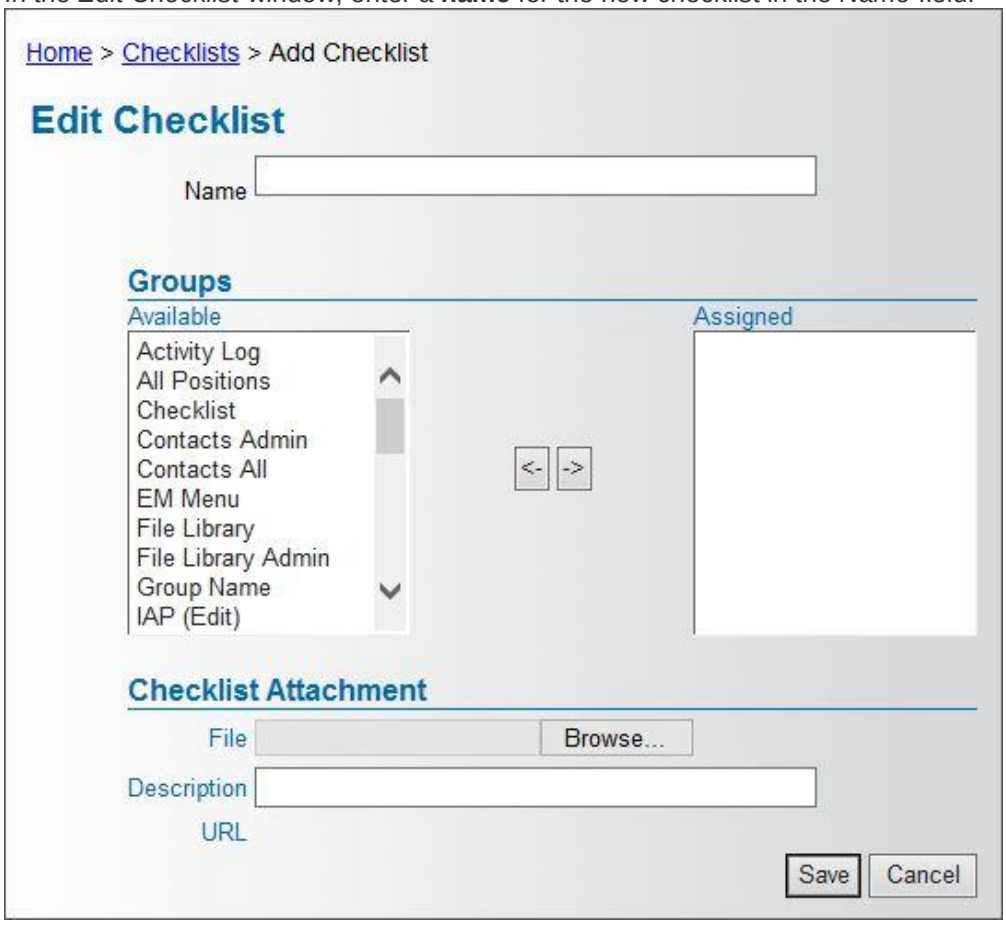
Adding a Checklist

To add a checklist, follow the steps below.

1. Select the **Checklists** link in the *Plugins* section of the admin window.
2. Select the **Add Checklist** button.



3. In the *Edit Checklist* window, enter a **name** for the new checklist in the *Name* field.



4. Select a **group** or **groups** from the *Available* list that will have access to this checklist, and select the **right arrow** to move the group to the *Assigned* list.

Note: Remove a group by selecting it in the Assigned list, and selecting the left arrow to move it back to the Available list.

5. Adding an attachment to your checklist is optional. To add an attachment, perform the following.

    a. In the *Checklist Attachment* section, select the **Browse** button next to the *File* field.

    b. Locate the file you want to attach, and select the **Open** button.

Note: You can replace the existing file by uploading a new file in its place. To upload multiple files, create a ZIP file.

    c. In the Description field, enter a description for the file you uploaded.

6. After you save the checklist, the URL area will populate with the location of your uploaded file.

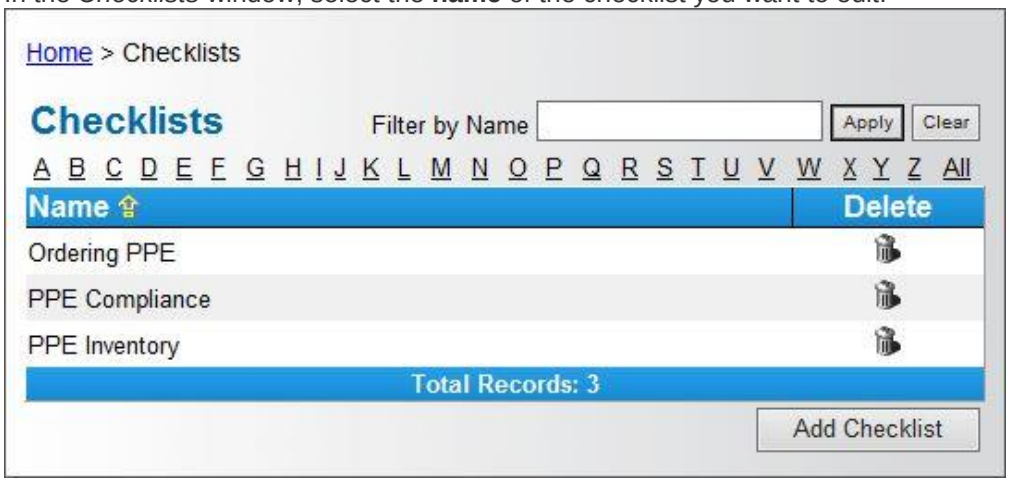
7. Select the **Save** button to save the checklist, or select the **Cancel** button to abort the operation. After you save the checklist, you can add items to the checklist. See the *Checklist Items* topic in this section.

Editing a Checklist

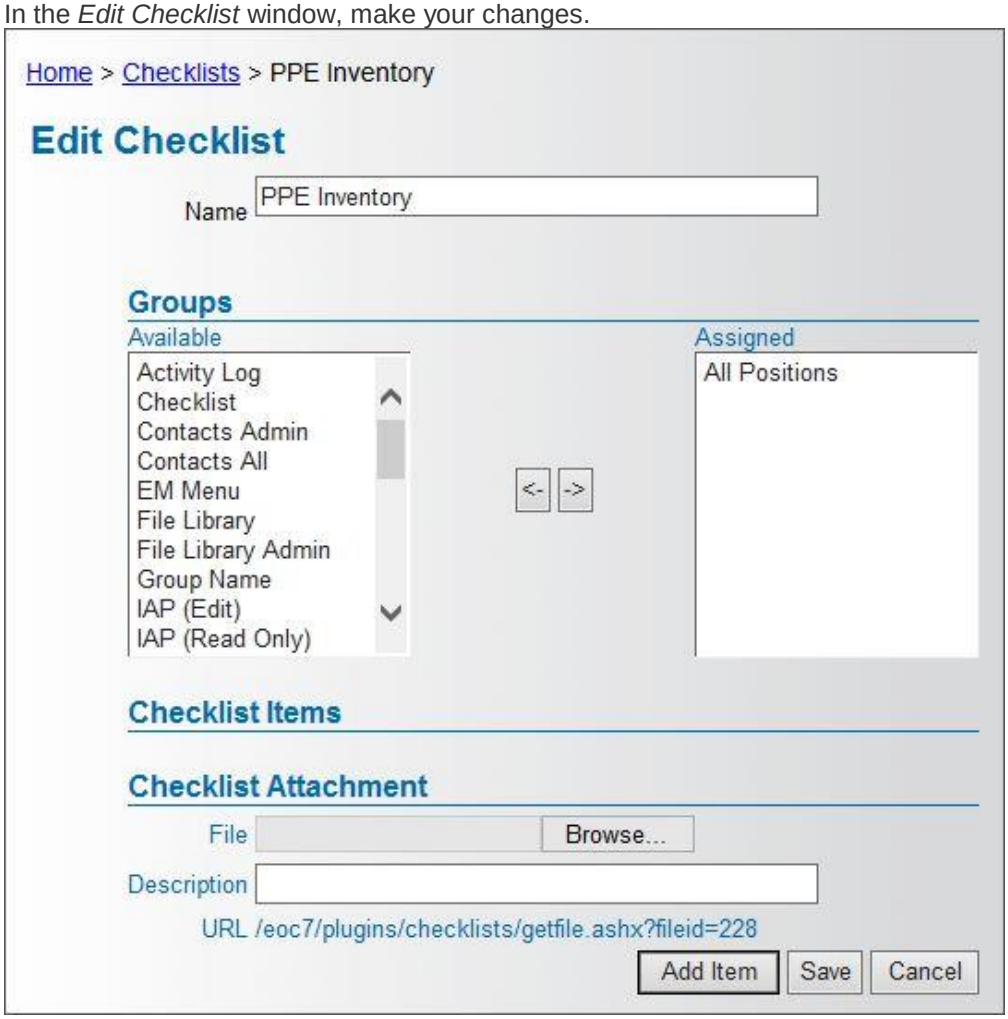
To edit a checklist, follow the steps below.

1. Select the **Checklists** link in the *Plugins* section of the admin window.

2. In the *Checklists* window, select the **name** of the checklist you want to edit.



3. In the *Edit Checklist* window, make your changes.



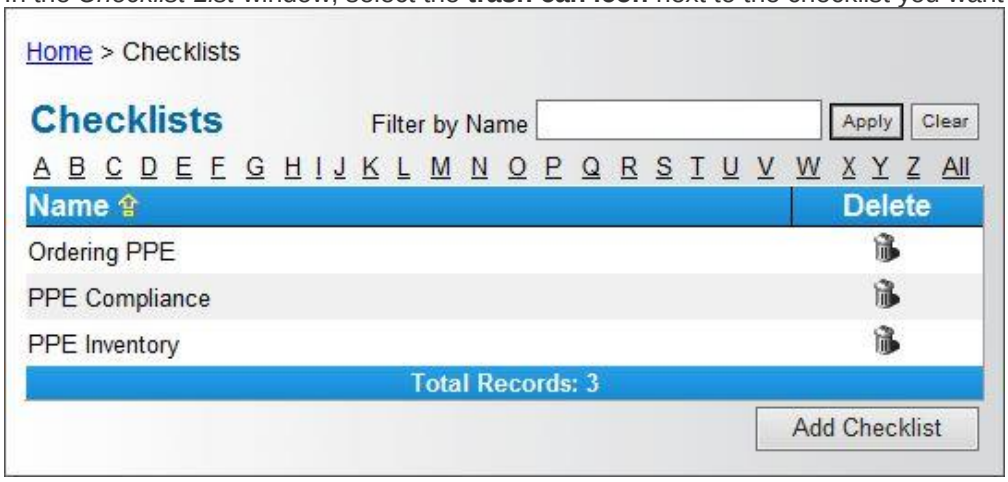
4. Select the **Save** button to save your changes, or select the **Cancel** button to abort the operation.

Deleting a Checklist

To delete a checklist, follow the steps below.

1. Select the **Checklists** link in the *Plugins* section of the admin window.

2. In the *Checklist List* window, select the **trash can icon** next to the checklist you want to delete.



3. When the delete conformation dialog box appears, select the **OK** button to delete the checklist, or select the **Cancel** button to abort the operation.

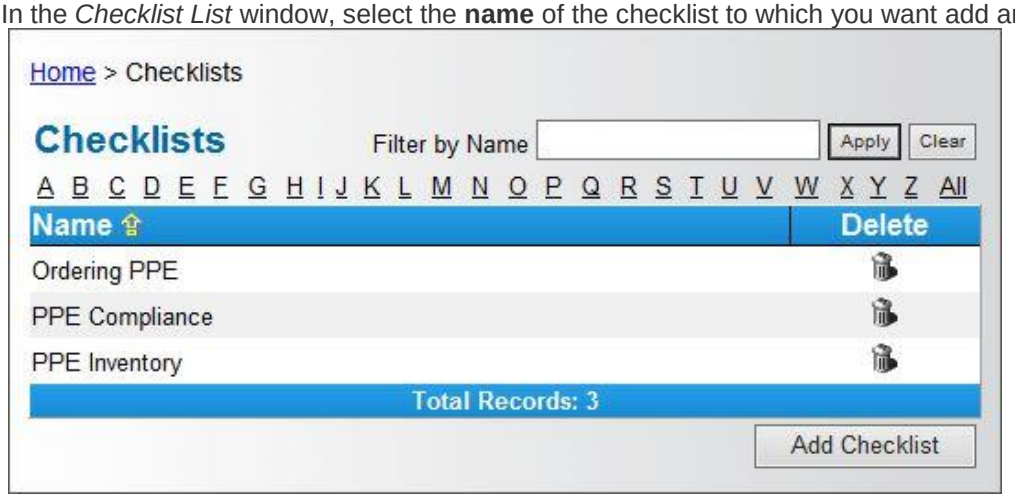
Adding an Item to a Checklist

WebEOC allows you to add items to a checklist and establish time requirements that users must follow. Steps can be ordered and reordered, and sub-steps can be assigned.

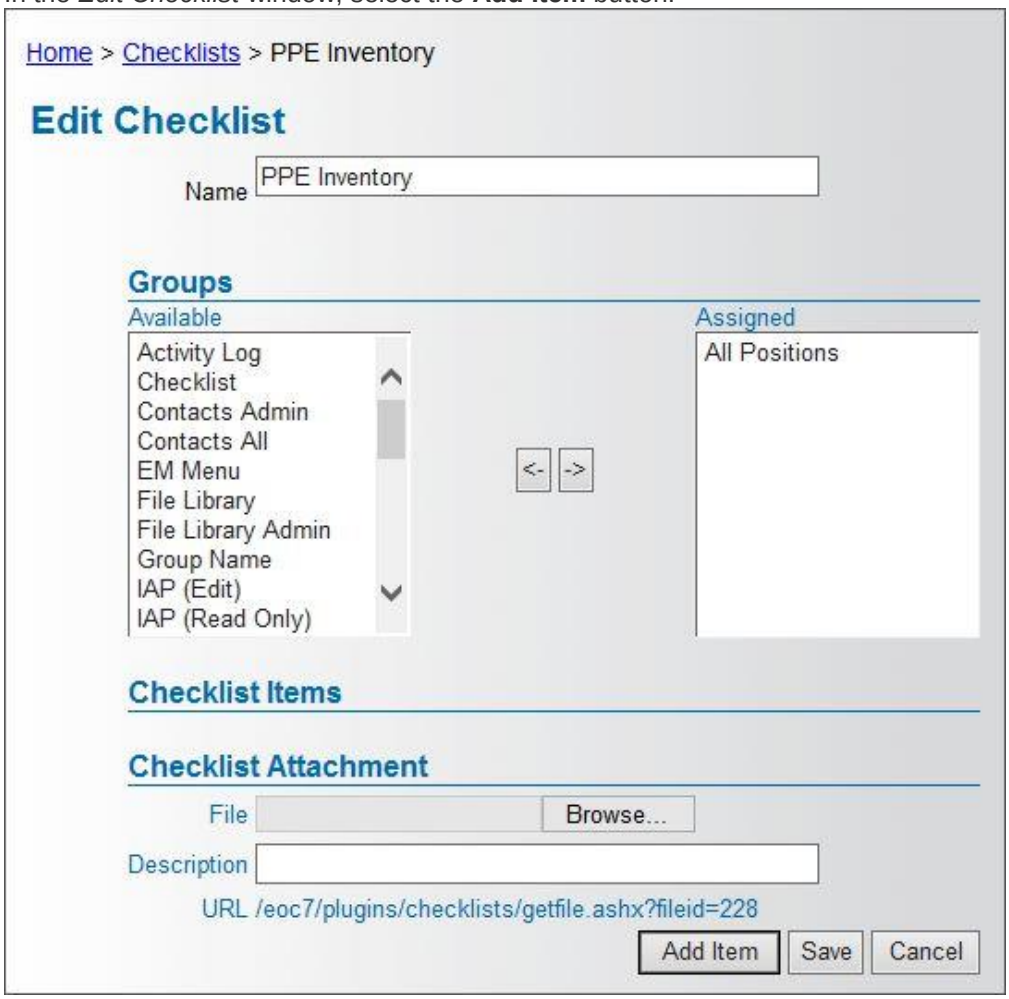
To add an item to a checklist, follow the steps below.

1. Select the **Checklists** link in the *Plugins* section of the admin window.

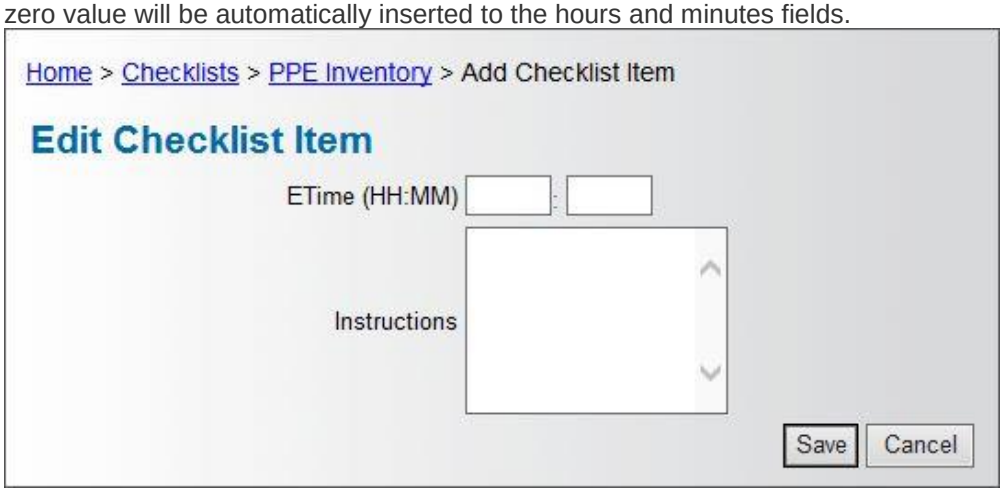
2. In the *Checklist List* window, select the **name** of the checklist to which you want add an item.



3. In the *Edit Checklist* window, select the **Add Item** button.



4. When the *Edit Checklist Item* window appears, enter the amount of **time** necessary to complete this checklist task in the *ETime (HH:MM)* field. ETimes are not required. If an ETime is not configured, a zero value will be automatically inserted to the hours and minutes fields.



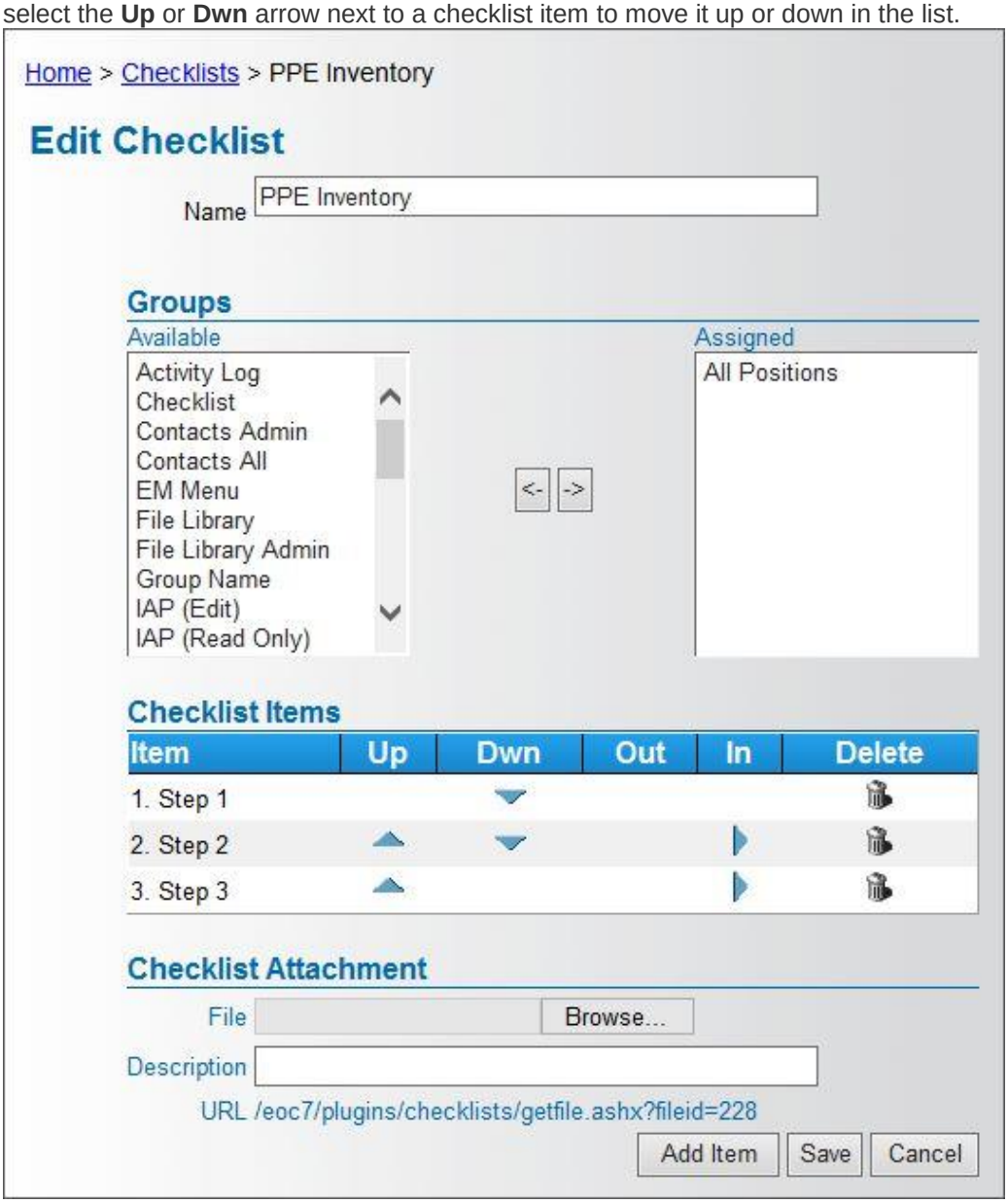
Note: ETimes are calculated from the incident time configured in the Incidents manager. If an ETime is assigned, the step status will turn red on the user side when it becomes past due. For example, an incident is created with an incident time of 18:30. A checklist step is configured with an ETime of 30 minutes. If the step has not been marked completed, previously accomplished, or not applicable by 19:00, it will turn red on the user side.

5. Enter **instructions** for the step in the *Instructions* text box.

6. Select the **Save** button to save the checklist item, or select the **Cancel** button to abort the operation.

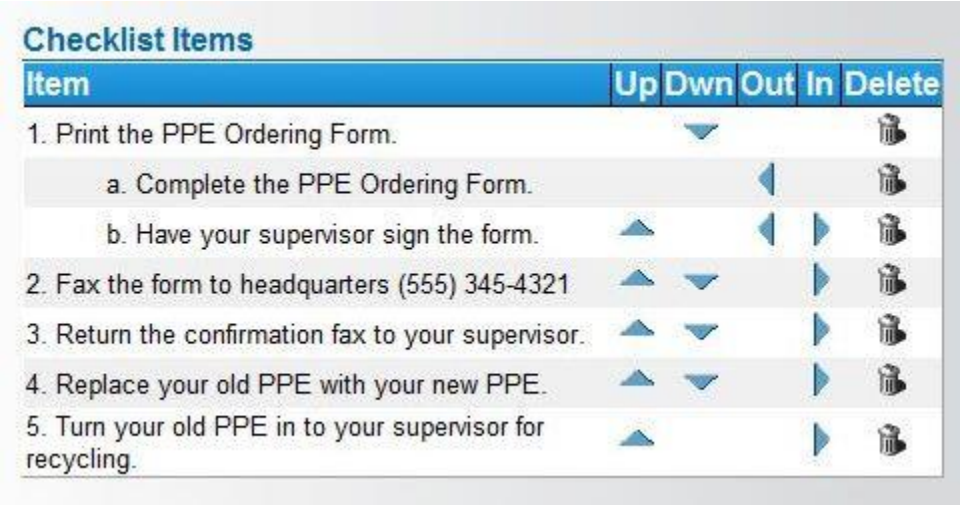
Reordering Checklist Items

After you have entered your checklist items, you may want to reorder them. In the *Edit Checklist* window, select the **Up** or **Dwn** arrow next to a checklist item to move it up or down in the list.



Creating Sub Steps

In the *Edit Checklist* window, select the **Out** or **In** arrows to turn a main task into a sub step. Sub steps are lettered.

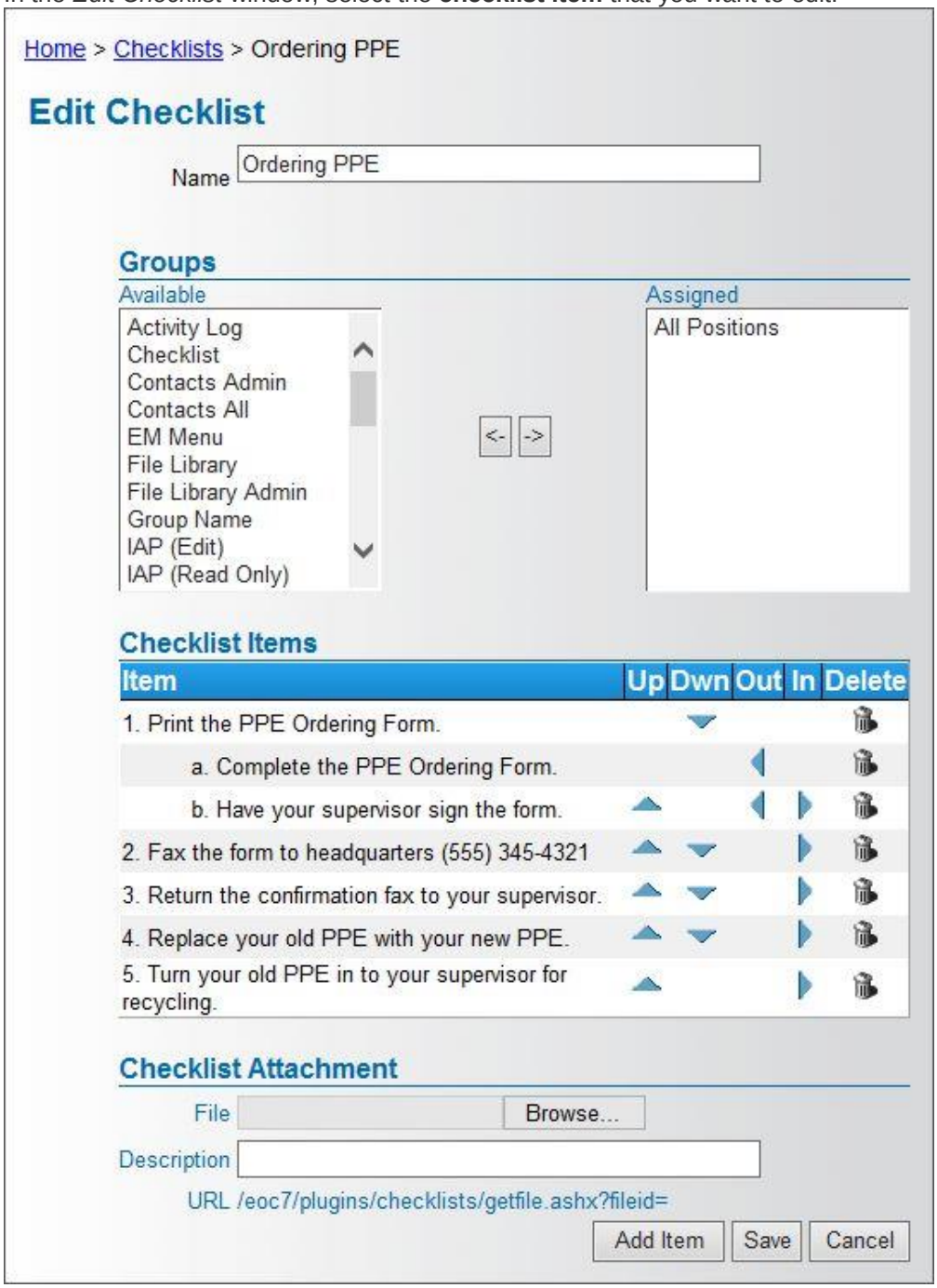

Checklist Items
Item
Up
Dwn
Out
In
Delete
1. Print the PPE Ordering Form.
a. Complete the PPE Ordering Form.
b. Have your supervisor sign the form.
2. Fax the form to headquarters (555) 345-4321
3. Return the confirmation fax to your supervisor.
4. Replace your old PPE with your new PPE.
5. Turn your old PPE in to your supervisor for recycling.

Editing a Checklist Item

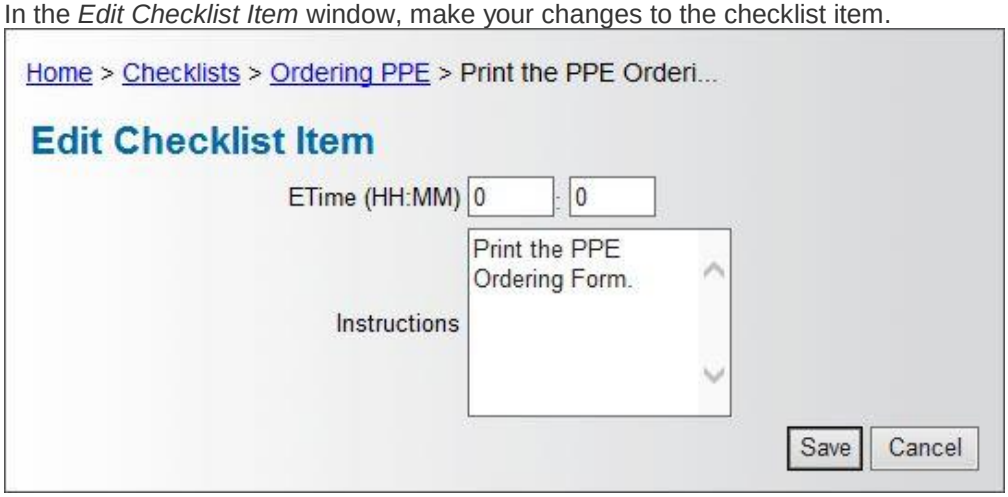
To edit a checklist item, follow the steps below.

1. Select the **Checklists** link in the *Plugins* section of the admin window.
2. In the *Checklist List* window, select the **name** of the checklist you want to edit.

3. In the *Edit Checklist* window, select the **checklist item** that you want to edit.



4. In the *Edit Checklist Item* window, make your changes to the checklist item.



5. Select the **Save** button to save your changes, or select the **Cancel** button to abort the operation.

Deleting a Checklist Item

To delete a checklist item, follow the steps below.

1. Select the **Checklists** link in the *Plugins* section of the admin window.
2. Select the **checklist** that contains the checklist item you want to delete.
3. Select the **trash can icon** next to the checklist item you want to delete.
4. When the delete confirmation dialog box appears, select the **OK** button to delete the checklist item, or select the **Cancel** button to abort the operation.

The File Library Manager

The *File Library* plug-in allows WebEOC users to upload and share documents and files with other users through WebEOC. The file could be a standard operating procedure, situation report, PDF, image file, or other file type. In order to use files and folders, you must assign permissions in the *File Library* plug-in to the groups that need access.

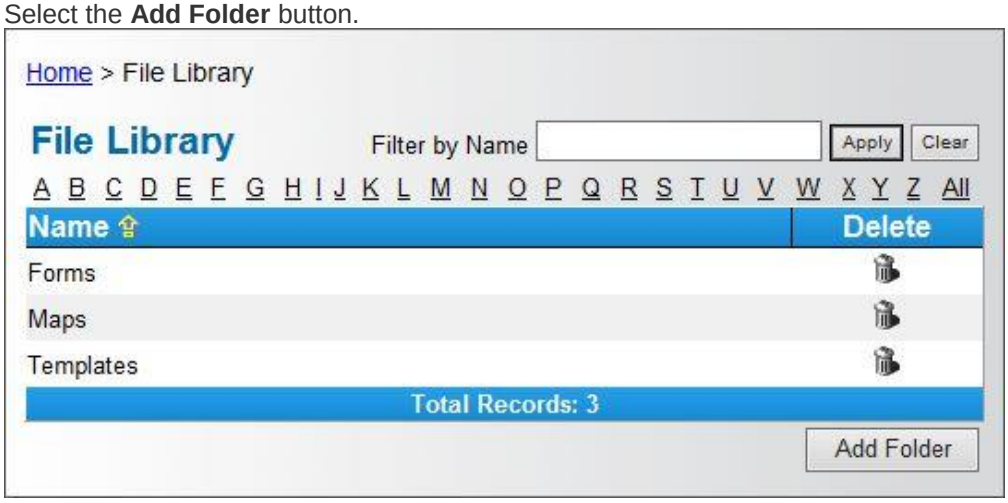
Files are categorized and managed through the use of folders. The *File Library* manager allows you to add, edit, and delete folders.

Adding a Folder

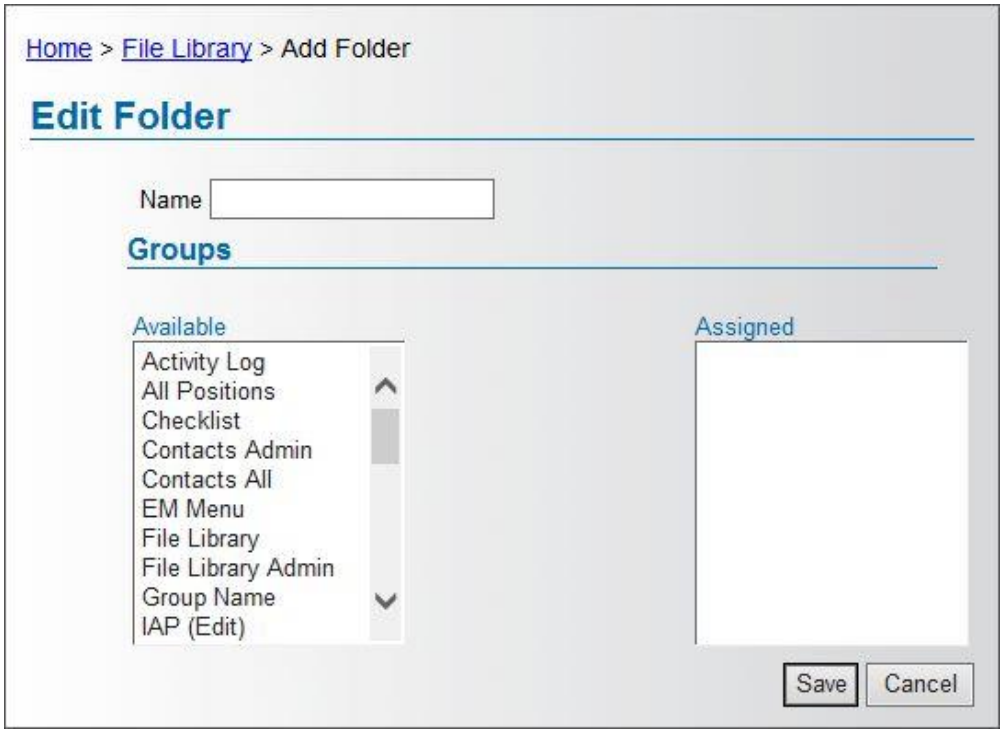
To add a folder, follow the steps below.

1. Select the **File Library** link in the *Process* section of the admin window.

2. Select the **Add Folder** button.



3. Enter a **name** for the folder in the *Name* field.



4. Select a **group** in the *Available* list.

5. Select the appropriate **permission level** from the *Permission* drop-down list (Read Only, Read/Write, or Read/Write/Delete).
    a. With *Read* permissions, a user can only view files in that folder.
    b. With *Read/Write* permissions, a user can view all files residing in that folder and add a file to the folder.
    c. With *Read/Write/Delete* permissions, a user can view, add, edit, and delete files in the folder.
6. Select the **right arrow** to move the group to the *Assigned* list.
7. Select **Save** button to save the folder, or select the **Cancel** button to abort the operation.

Editing a Folder

To edit a folder, follow the steps below.

1. Select the **File Library** link in the *Process* section of the admin window.
2. In the *File Library* window, select the **name** of the folder you want to edit.
3. In the *Edit Folder* window, make your changes.
4. Select the **Save** button to save your changes, or select the **Cancel** button to abort the operation.

Deleting a Folder

To delete a folder, follow the steps below.

1. Select the **File Library** link in the *Process* section of the admin window.
2. Select the **trash can icon** next to the folder you want to delete.

Note: If you delete a folder, all the contents in that folder are deleted as well.

3. When the delete confirmation dialog box appears, select the **OK** button to delete the folder, or select the **Cancel** button to abort the operation.

The MapTac Manager

MapTac is a briefing tool that allows an authorized user to publish an image file of a map, dispersion model, digital photo, etc., from any map/GIS source or digital camera. The user can place markers and labels on the image from the *MapTac* palette; add shapes and polygons to mark hot zones or other areas of interest; and share the map with authorized users instantly.

With *MapTac*, GIS professionals can use GIS tools to add layers to maps and then present the user with the desired level of detail by saving the map as a JPEG, GIF, or PNG. After the map is published in *MapTac*, any authorized user can select the map file from a drop-down list, and the map will be displayed on the screen.

Similar to maps, marker images (JPEG, GIF, BMP, etc.) are saved in the database and then configured through *MapTac*. During configuration, URLs can be added to icons that allow users access to related information.

In addition to general map icons, *MapTac* includes DHS symbols that are now considered the standard in emergency management agencies.

Use the *Groups* manager to enable users to access *MapTac* from the control panel. *MapTac* will appear as a link in the *Plugins* section of the control panel.

Users with the appropriate permissions can view and/or add markers such as push pins, emergency vehicles, roadblocks, etc.

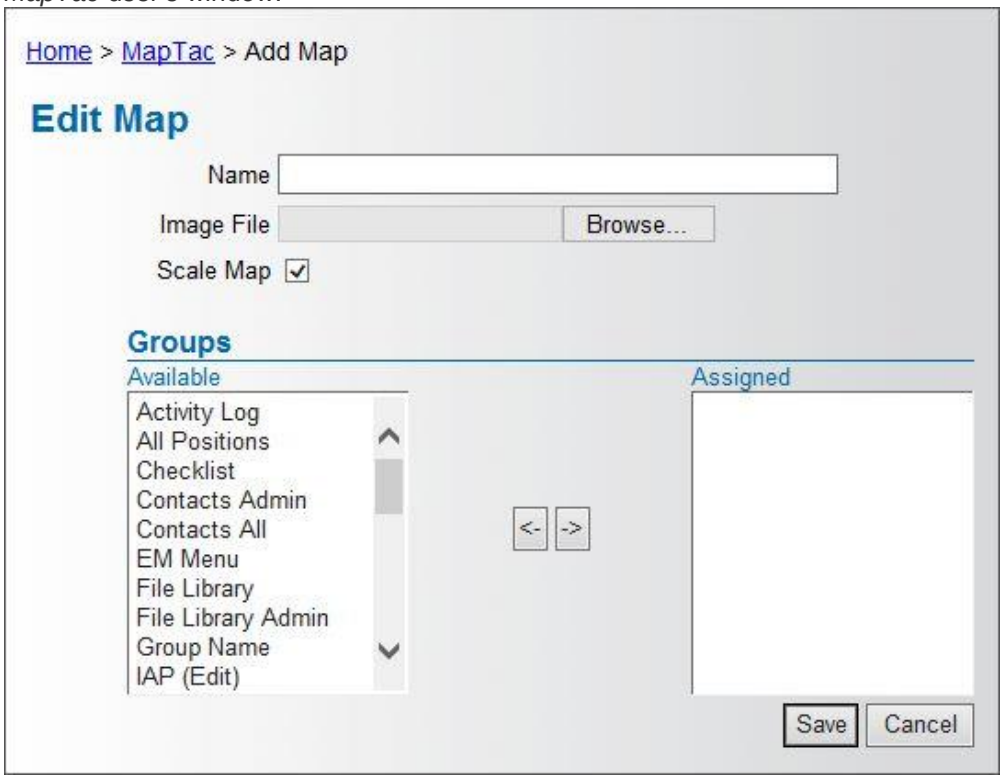
Adding a Map

To add a map file, follow the steps below.

1. Select the **MapTac** link in the *Plugins* section of the admin window.

2. In the *MapTac* window, select the **Add Map** button.

3. Enter a **name** for the map in the *Name* field. This name will appear in the *Maps* drop-down list in the *MapTac* user's window.



4. Select the **Browse** button next to the *Image File* field.

5. Locate your map file, and select the **Open** button.

6. Select the **Scale Map** check box if you want to scale the image to fit the *MapTac* display window. This option cannot be changed once the map is saved.

Note: It is recommended that large, high resolution images such as digital photos not be set to scale in order to maintain the correct aspect ratio of the image being viewed.

7. In the *Groups* section, select the **group** or **groups** that will have access to the map in *MapTac* from the *Available* list, and select the **right arrow** to move the group to the *Assigned* list.

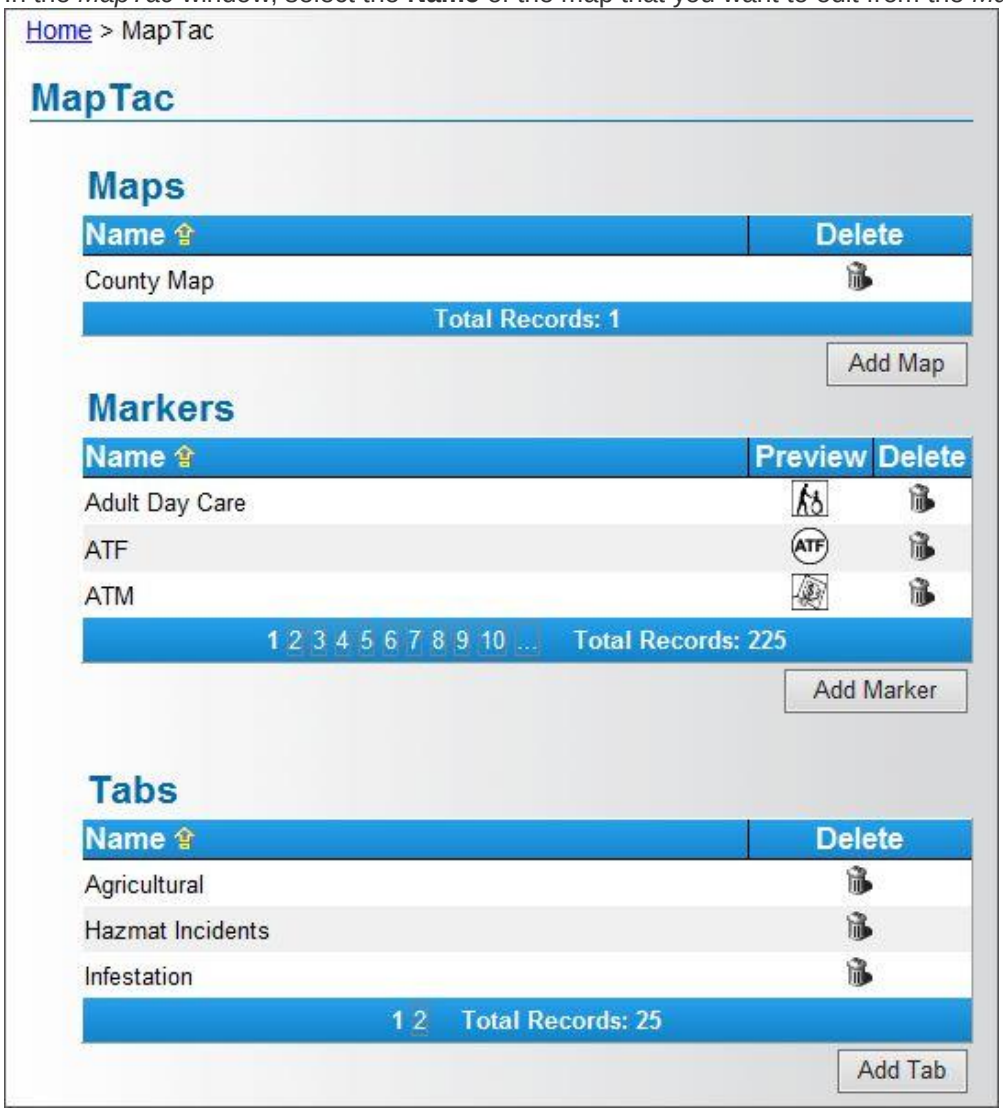
8. If groups are not assigned, the map will not be available in *MapTac*.

9. Select the **Save** button to save the map file, or select the **Cancel** button to abort the operation.

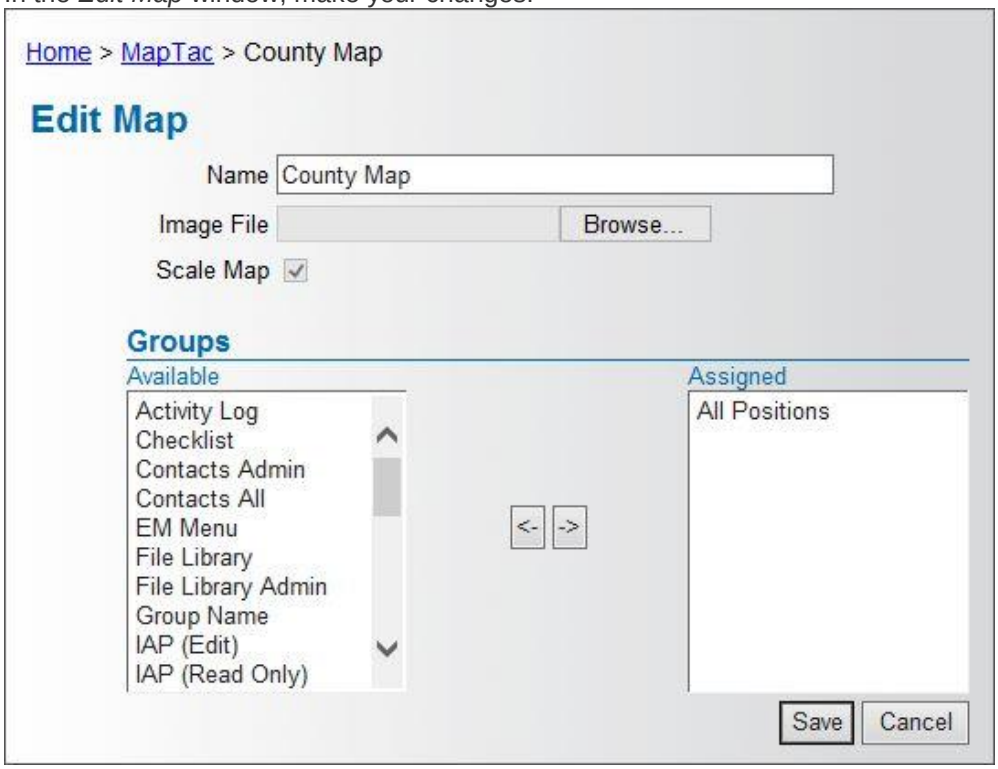
Editing a Map

To edit a map, follow the steps below.

1. In the *MapTac* window, select the **Name** of the map that you want to edit from the *Maps* list.



2. In the *Edit Map* window, make your changes.

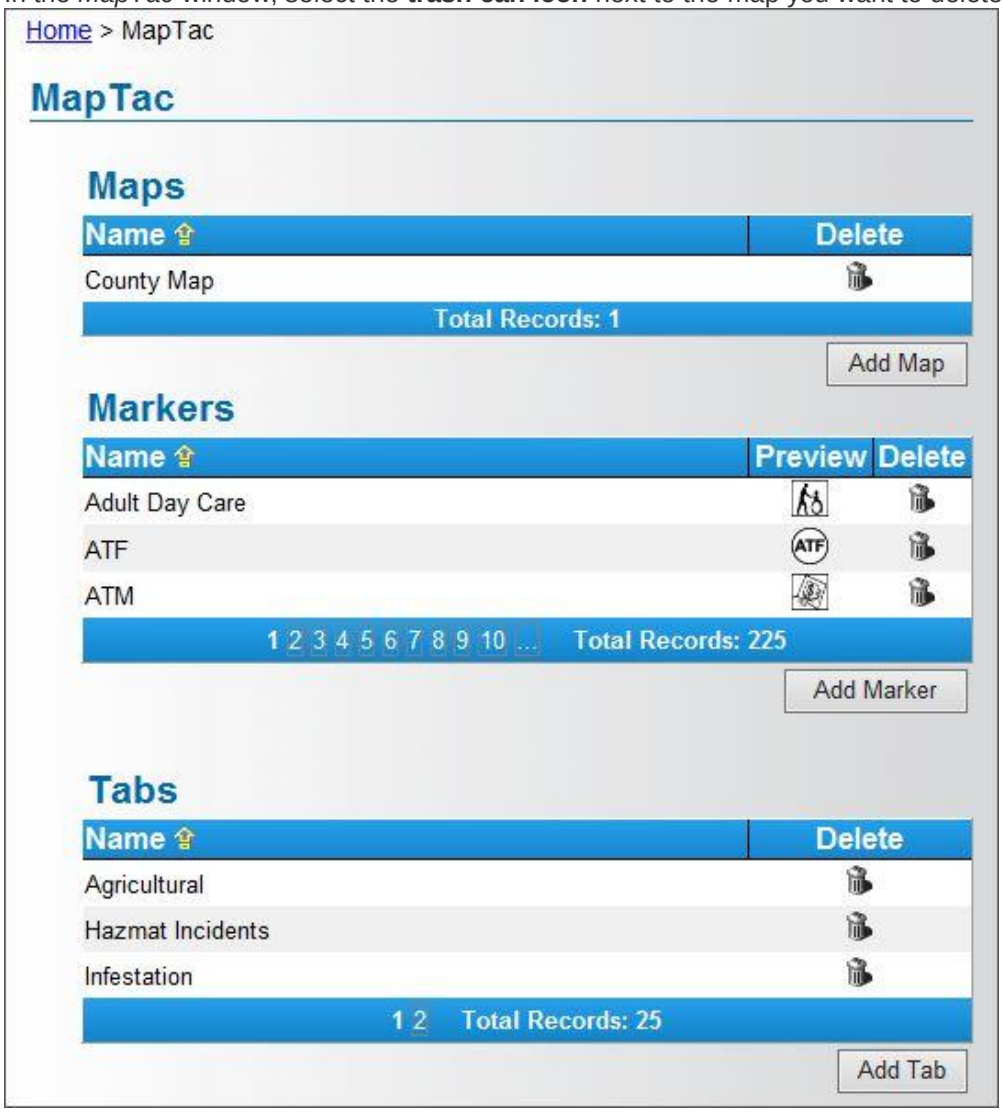


3. Select the **Save** button to save your changes, or select the **Cancel** button to abort the operation.

Deleting a Map

To delete a map, follow the steps below.

1. In the *MapTac* window, select the **trash can icon** next to the map you want to delete.



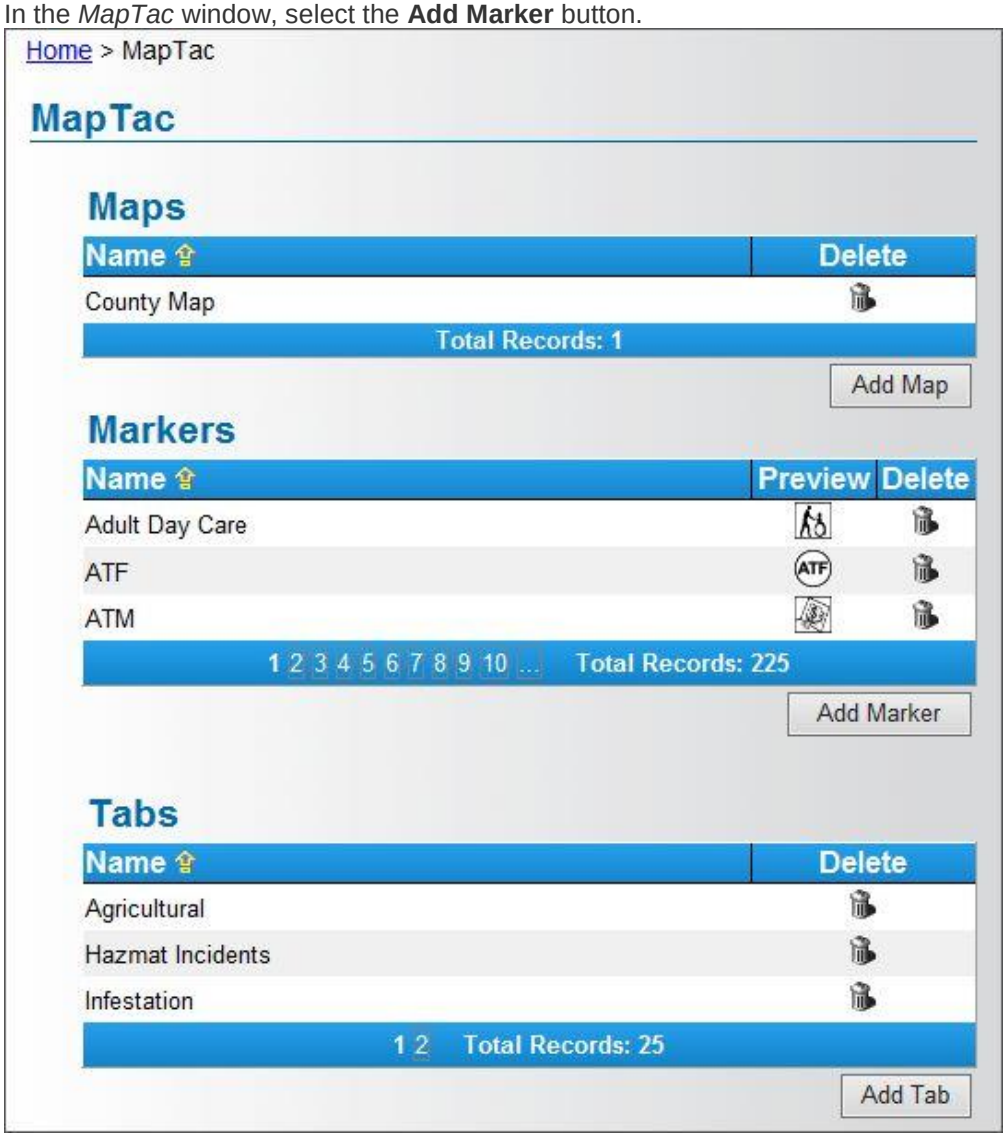
2. When the delete confirmation dialog box appears, select the **OK** button to delete the map, or select the **Cancel** button to abort the operation.

Adding a Marker

Markers are symbols that users place on a map to mark an item of significance. This could be a building, the location of resources, an incident, etc. *MapTac* comes pre-loaded with 25 categories of DHS symbology.

To add a marker, follow the steps below.

1. In the *MapTac* window, select the **Add Marker** button.



2. Enter a **name** for the marker in the *Name* field.

3. Enter a **URL** for the marker in the *URL* field. (This field is optional.)

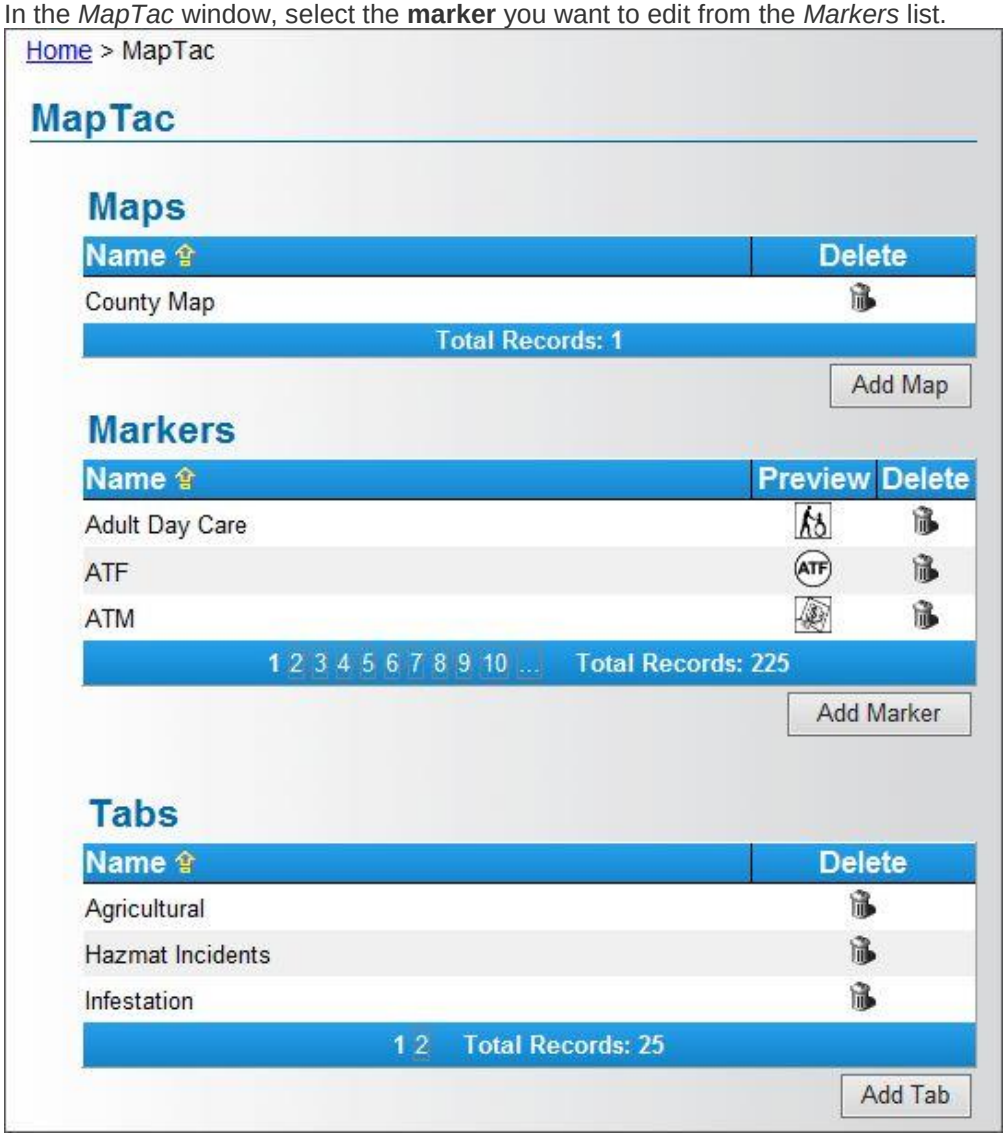
Note: Select the icon on the map to open the URL.

4. Select the **Browse** button next to the *Image File* field.
5. Locate the file, and select the **Open** button.
6. In the *Tabs* section, select the tab (or tabs) where you want the marker to appear in the user view from the *Available* list, and select the **right arrow** to move the tab to the *Assigned* list.
7. Select the **Save** button to save the marker, or select the **Cancel** button to abort the operation.

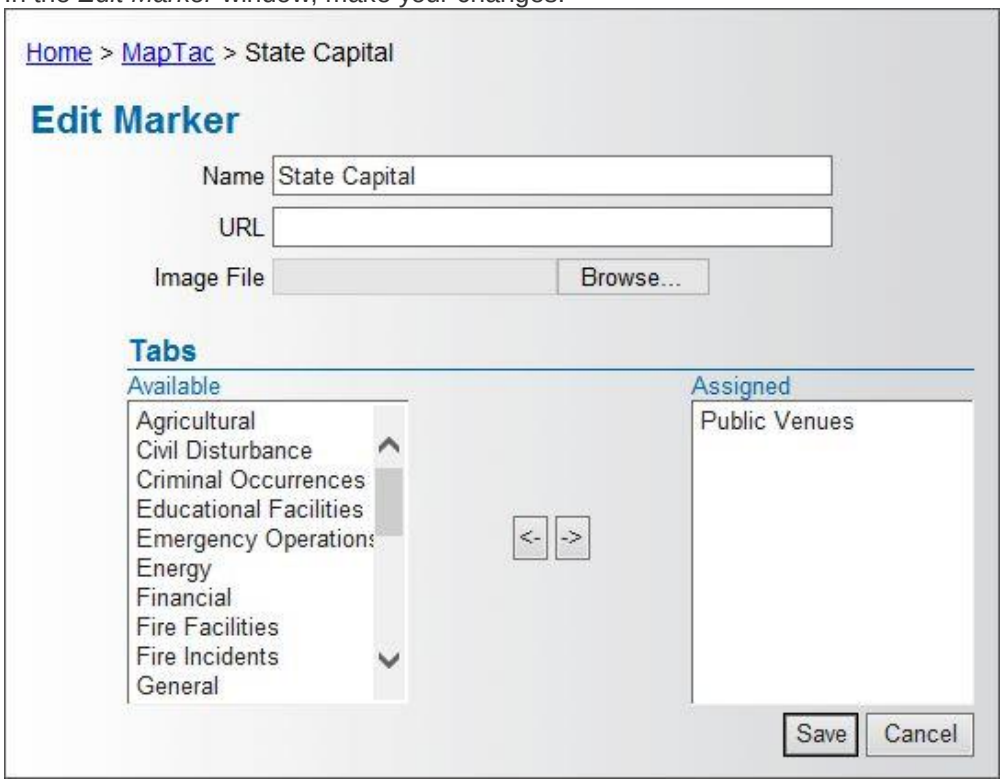
Editing a Marker

To edit a marker, follow the steps below.

1. In the *MapTac* window, select the **marker** you want to edit from the *Markers* list.



2. In the *Edit Marker* window, make your changes.

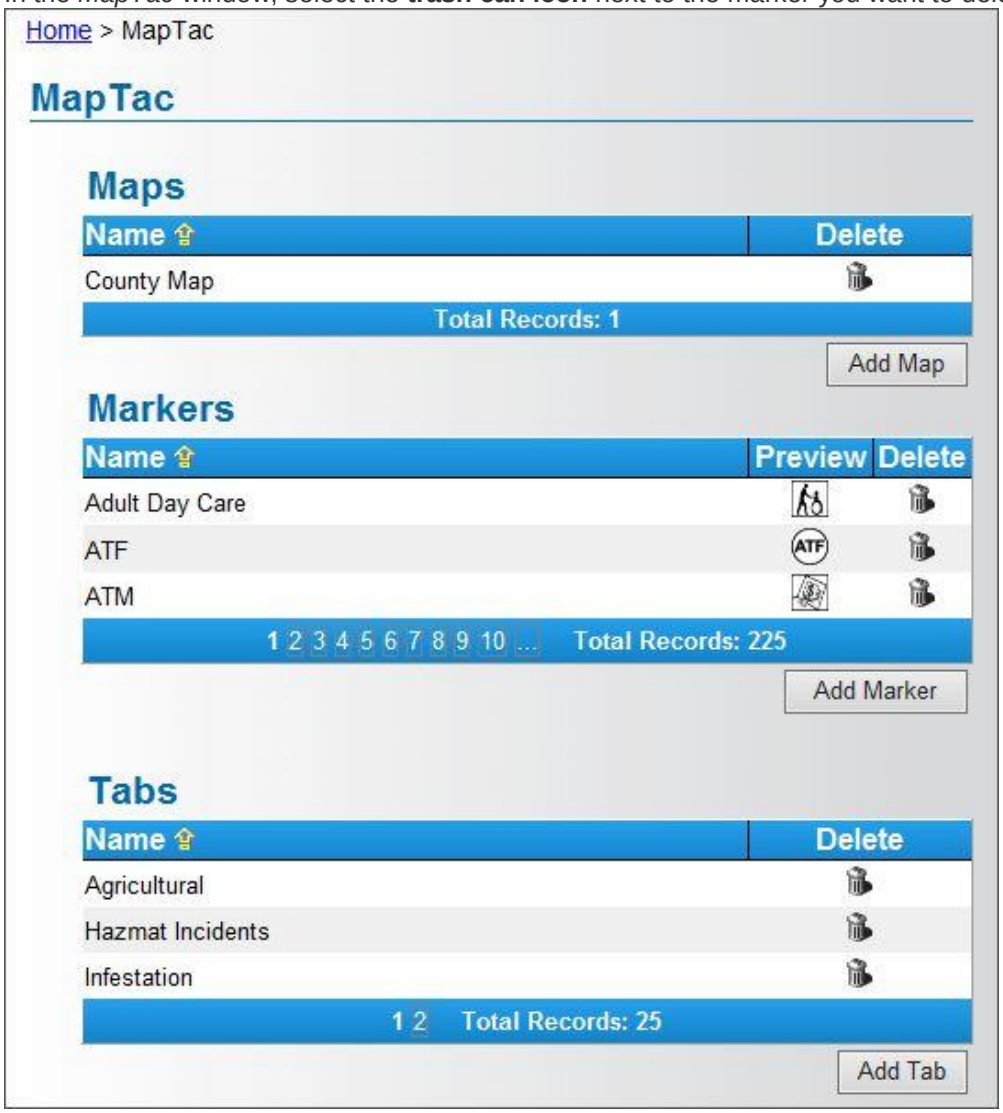


3. Select the **Save** button to save your changes, or select the **Cancel** button to abort the operation.

Deleting a Marker

To delete a marker, follow the steps below.

1. In the *MapTac* window, select the **trash can icon** next to the marker you want to delete.



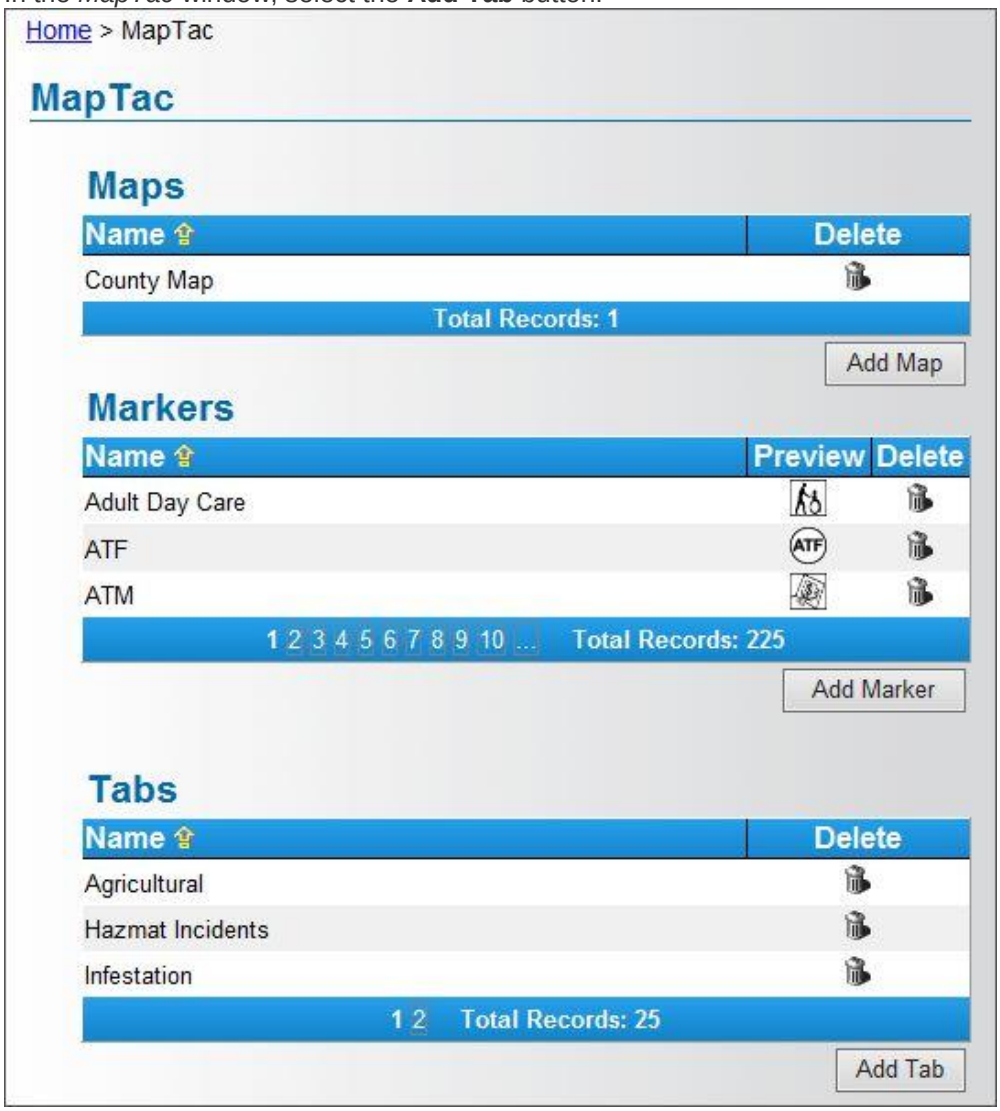
2. When the delete confirmation dialog box appears, select the **OK** button to delete the marker, or select the **Cancel** button to abort the operation.

Adding a Tab

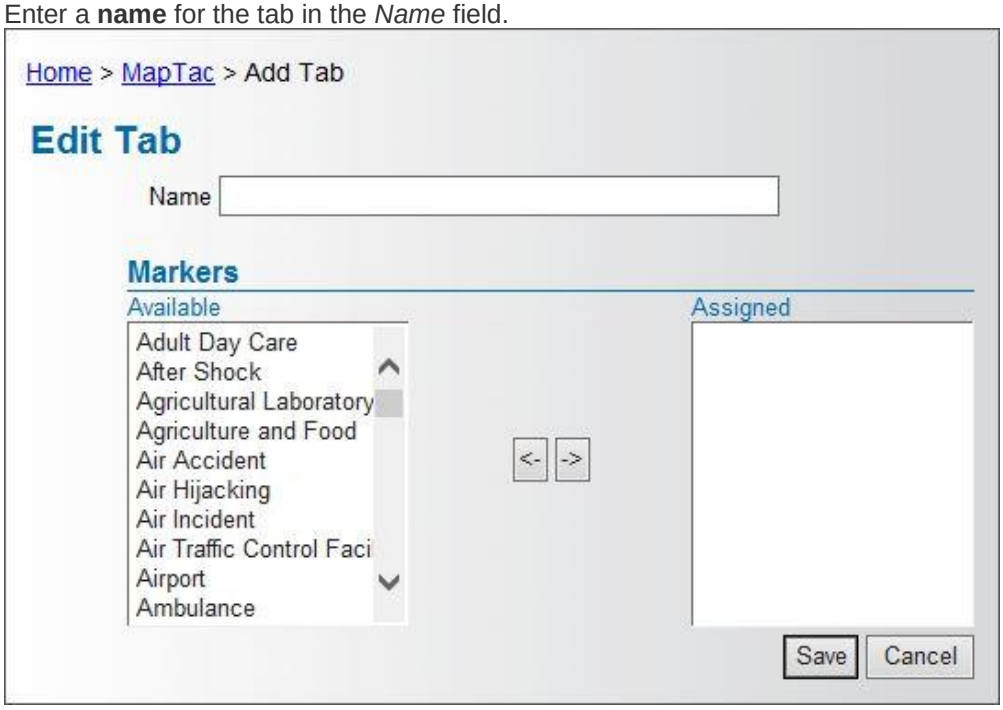
Tabs allow you to place markers into categories. In creating a tab, you can select those symbols that fit a particular category. Categories assist users in quickly locating symbols they need to place on a map.

To add a tab, follow the steps below.

1. In the *MapTac* window, select the **Add Tab** button.



2. Enter a **name** for the tab in the *Name* field.



3. In the *Markers* section, select the **marker** or **markers** you want to be available in this tab from the *Available* list, and select the **right arrow** to move the marker to the *Assigned* list.

Note: Remove a marker by selecting it in the Assigned list, and selecting the left arrow to move it back to the Available list.

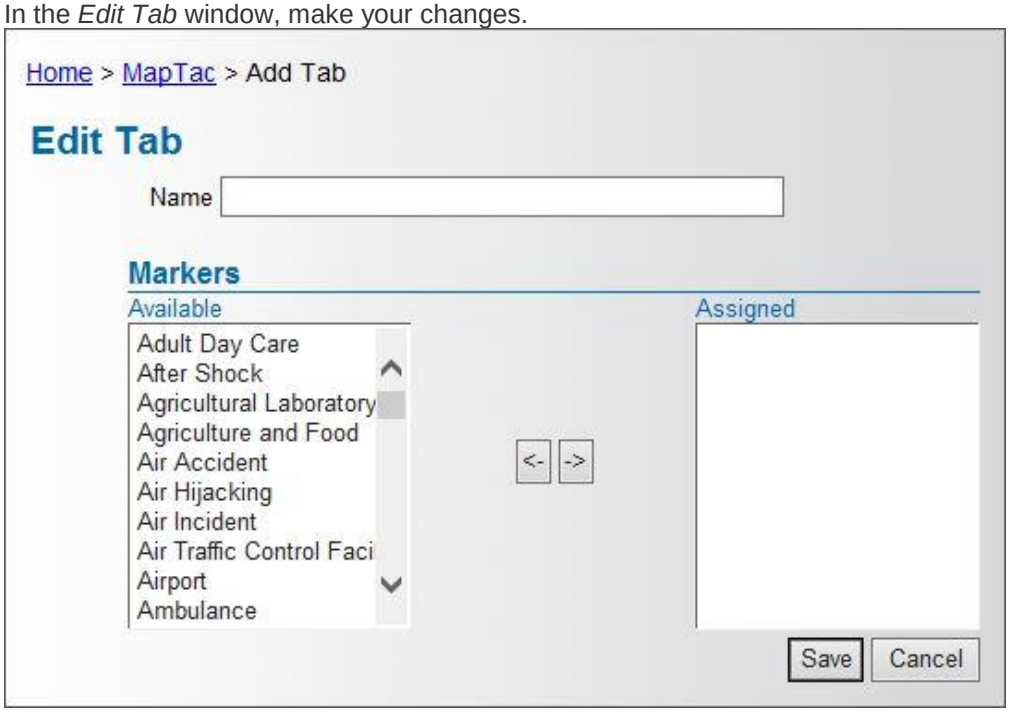
4. Select the **Save** button to save the tab, or select the **Cancel** button to abort the operation.

Editing a Tab

To edit a tab, follow the steps below.

1. In the *MapTac* window, select the **name** of the tab that you want to edit from the *Tabs* list.

2. In the *Edit Tab* window, make your changes.

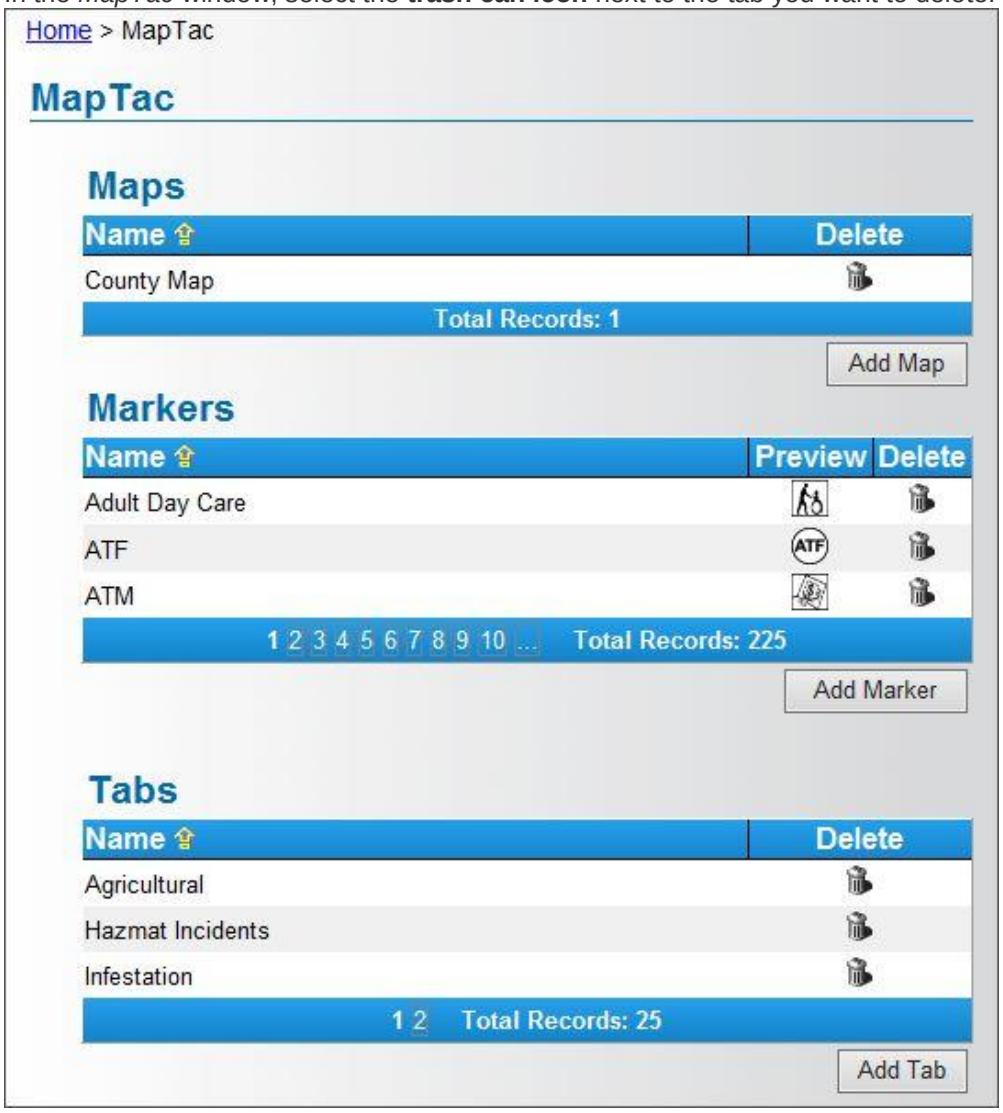


3. Select the **Save** button to save your changes, or select the **Cancel** button to abort the operation.

Deleting a Tab

To delete a tab, follow the steps below.

1. In the *MapTac* window, select the **trash can icon** next to the tab you want to delete.



2. When the delete confirmation dialog box appears, select the **OK** button to delete the tab, or select the **Cancel** button to abort the operation.

The Scroller Manager

WebEOC includes a *Scroller* utility that enables users to view the most recent data from selected boards on a timed interval and in a single window. This feature is useful when users are limited to a single monitor or your agency is limited in display capability. *Scroller* reduces the need to individually open and/or close multiple boards in order to obtain the most current information.

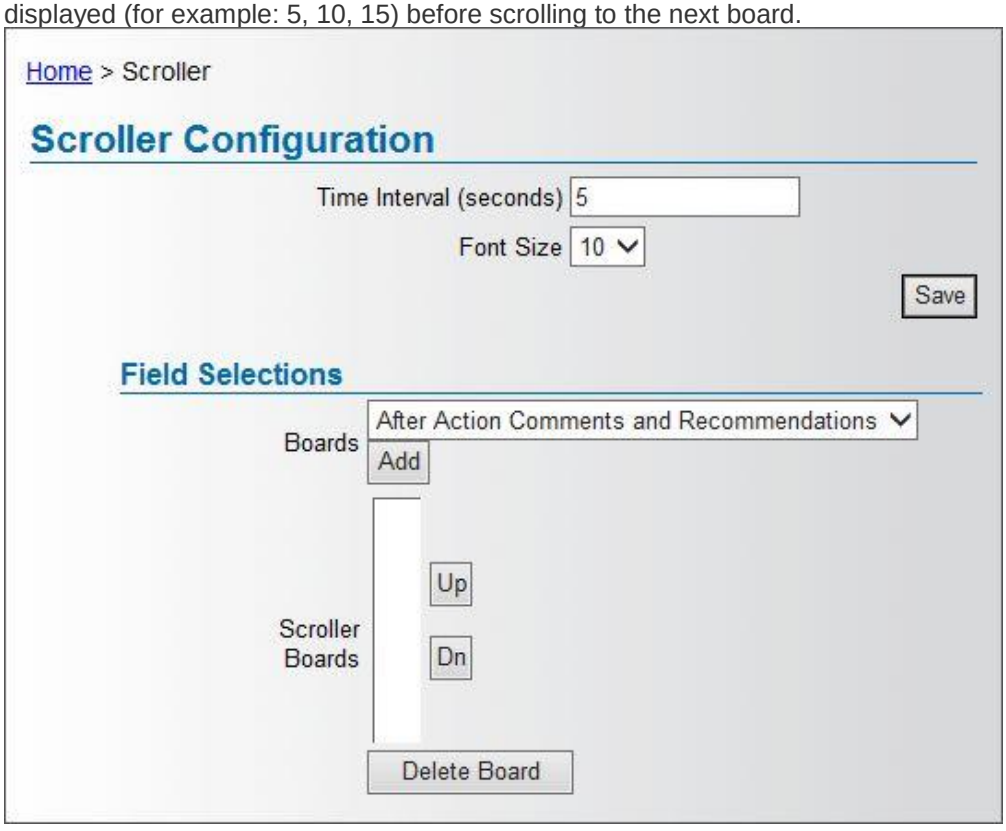
In addition to selecting the boards that will be added to *Scroller*, you must decide which fields to display and determine how long each board will be visible before the window scrolls to the next board in the queue.

Use the *Groups* manager to enable users to access *Scroller* from the control panel. *Scroller* will appear as a link in the *Plugins* section of the control panel.

Configuring Boards for Scroller

To configure boards for Scroller, follow the steps below.

1. Select the **Scroller** link in the *Plugins* section of the admin window.
2. Enter a **time interval**, in seconds, in the *Time Interval* field. This is the amount of time a board will be displayed (for example: 5, 10, 15) before scrolling to the next board.



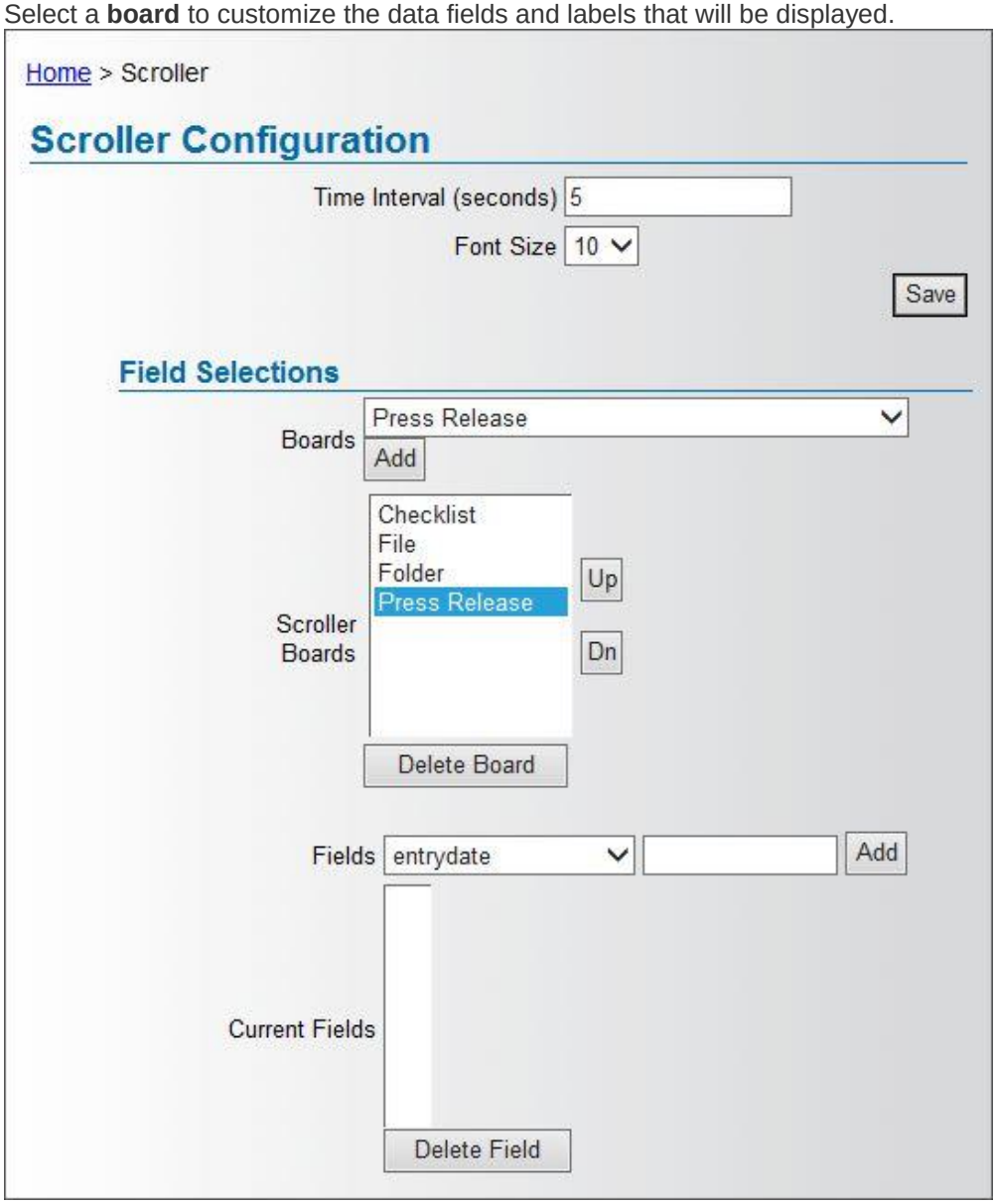
3. From the *Font Size* drop-down list, select the **font size** that labels and data will be displayed in on the user side.

4. In the *Field Selections* section, select a **board** from the drop-down list, and select the **Add** button. The board name will be added to the *Scroller Boards* box. Repeat this step to add as many boards as you want to the *Scroller*.

5. Change the order the boards will be viewed by selecting the board name, and selecting the **Up** or **Dn** buttons to move the board in the list.

6. Delete a board from the list by selecting the **board name**, and selecting the **Delete Board** button.

7. Select a **board** to customize the data fields and labels that will be displayed.



Note: Add the fields in the order in which you want them to appear in the Scroller window.

8. Select the **field** you want to add to the selected board from the *Fields* drop-down list, and enter a **label** for the field in the empty text field.

Note: Labels are optional. If a label is not specified, it will default to the system name for that field.

9. Select the **Add** button. The field will appear followed by the label you gave it in the *Current Fields* box.

Note: To delete a field, select the field name, and select the Delete Field button.

10. Repeat these steps for each board to complete the *Scroller* configuration.
11. Select the **Save** button to save your changes.

Disabling Scroller

If you want to discontinue the use of *Scroller*, remove *Scroller* from the groups you have it assigned to using the *Groups* manager.

Advanced Board Building

There are two tools you can use to create and edit board input and display views: the *Advanced Board Editor* and the *Board Wizard*.

Basic boards that have a single input and single display view can be built using the *Board Wizard*. Once the input and display views are built, you must go to the *Advanced Board Editor* to directly edit the board HTML, or add additional functionality such as data links, filters, control panel alerts, email capability, etc.

The *Advanced Board Editor* can be used to create and edit status boards with single input and display views, and must be used to build boards with multiple input and/or display views and add enhanced functionality. Using the *Advanced Board Editor* administrators can:

- Create, add, and customize input and display views.
- Set up data linking between boards.
- Add email functionality to a board.
- Set a control panel notifications when data is added to a board.
- Configure status board display filters.
- Perform HTML editing.

When more than one input or display view exists for a board, the following board options must be configured through the *Advanced Board Editor*. These functions listed below are described in the *Edit Board Overview* topic in *The Boards Manager* section.

- Input view options
    - Add Only
    - Lock User Input
    - Lock Position Input
    - Dual Commit server and region lists
- Display view options
    - Global

- Lock User View
- Lock Position View

Board designers with advanced knowledge of HTML and WebEOC conventions can customize boards to meet the specific requirements of their organization. WebEOC has a built-in HTML editor that features line numbers, syntax highlighting, formatting, and contextual auto-complete functionality. HTML can also be developed in an external HTML editing tool and added to WebEOC using the *Advanced Board Editor*.

Board building information presented in this topic is based on the board editing tools available through the *Advanced Board Editor*.

Advanced Board Building HTML Options

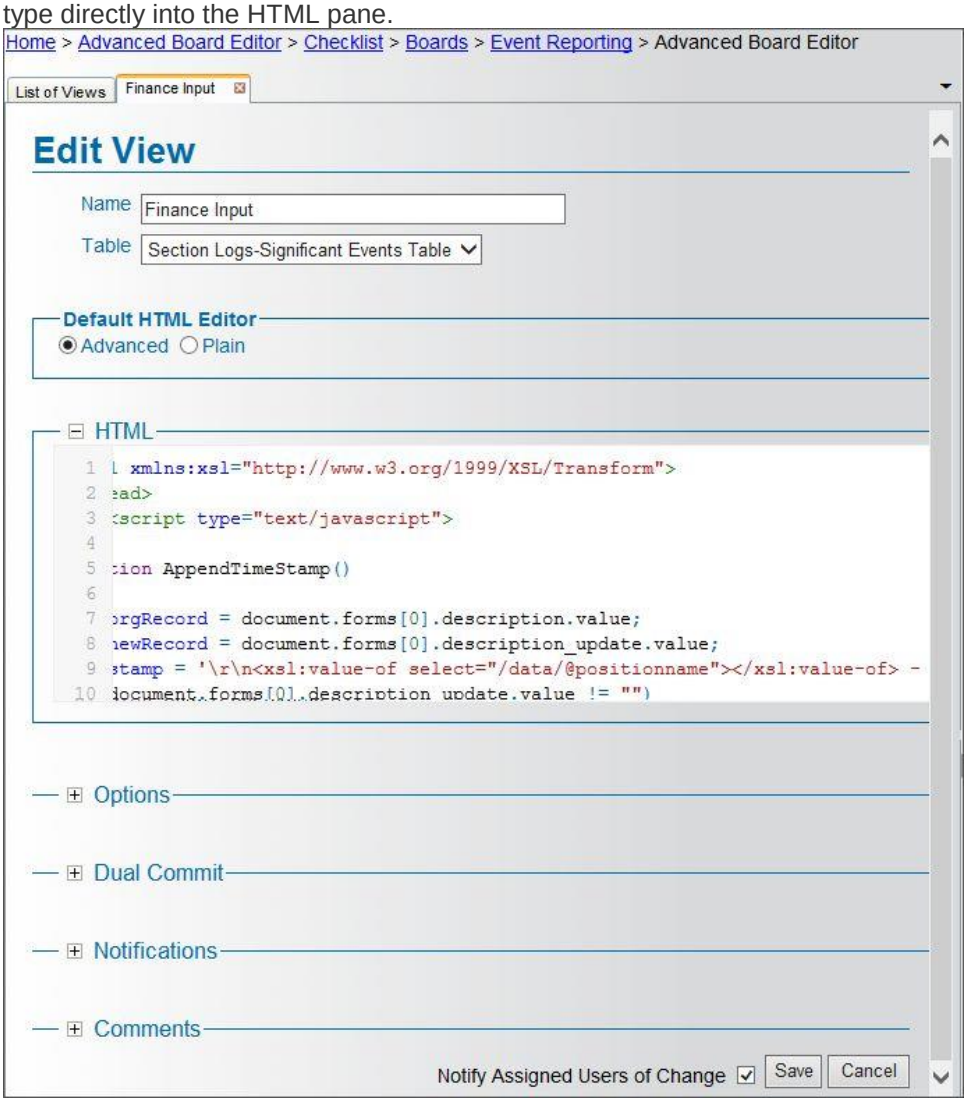
Designers with advanced knowledge of HTML and WebEOC conventions can customize boards to meet the specific requirements of their organization. WebEOC 7.4 has a built-in HTML editor that features line numbers, syntax highlighting, formatting, and contextual auto-complete functionality.

The Default HTML Editor radio buttons allow you to switch between Advanced and Plain displays in the HTML pane.

The HTML Editor in Advanced Board Editor provides the following capabilities and features.

- Add HTML developed in an external HTML editing tool to WebEOC using the HTML editor in Advanced Board Editor.

- Edit HTML directly in the HTML pane. This built-in HTML editor features line numbers, syntax highlighting, formatting, and contextual auto-complete functionality. To manually edit the HTML, type directly into the HTML pane.



- Change the name and table used for a view.

- Open multiple input views, display views, and tables and use the tab feature at the top of the Edit View screen to quickly switch between the views you have open and the complete list of board views.

Advanced Board Building Options

This section details specialized and advanced features and functions that you can add to your status boards.

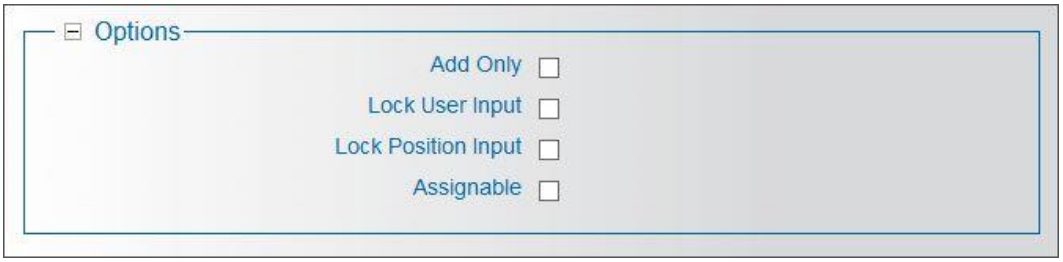
Board Options

You can configure certain behaviors for an input and/or display views and board tables in the Edit View and Edit Table windows.

Depending on the options you want to configure, you go to the Edit View window or the Edit Table window.

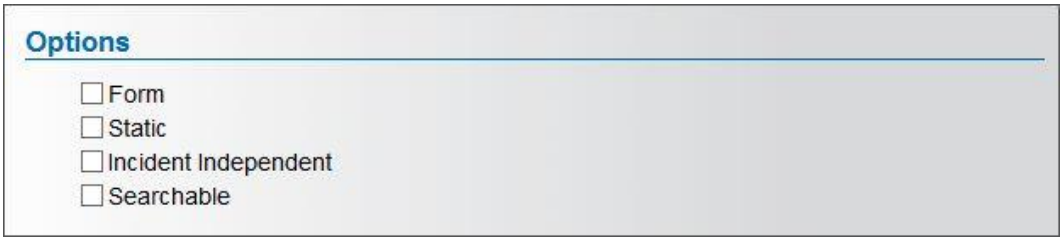
- The *Edit View* window is accessed by selecting the **name** of the input or display view in the respective *View List* section of the *Advanced Board Editor* window.
- The *Edit Table* window is accessed by selecting the **name** of the table in the *Table List* section of the *Advanced Board Editor* window. Each board option discussion provides the path to the area in *Advanced Board Editor* to help you navigate to the correct configuration screen (for example, **Advanced Board Editor** | **Input View** | **Edit View** | **Options**).

Input View Options



Display Views

Table Options



Assignable

Advanced Board Editor | Select the Input or Display View | Edit View - Options | Assignable

This view option allows you to define if a view can be assigned to a group. By default, it is selected, which means that the view can be assigned in the *Groups* manager. This is particularly useful when sharing boards (via import/export or ESiWebFusion). To disable the view so that it cannot be assigned, deselect the check box.

Add Only

Advanced Board Editor | Select the Input View | Edit View - Options | Add Only

Select the **Add Only** option if all entries including updates are to be displayed on the status board.

If the *Add Only* check box remains unselected, then only the last update for a record will be displayed on the status board. All entries for an incident are recorded in the database, including any updates.

Lock User Input

Advanced Board Editor | Select the Input View | Edit View - Options | Lock User Input

Select the **Lock User Input** option to set the data entry display to one entry for the specified status board per user. Subsequent entries made by a user are entered as updates through the input view for the board. If two or more users are logged in to a multi-user account, only the last entry from either user will appear.

Lock Position Input

Advanced Board Editor | Select the Input View | Edit View - Options | Lock Position Input

Select the **Lock Position Input** check box to set the data entry display to one entry for the specified status board per role. Subsequent entries made by a role are entered as updates through the input view for the board.

Global

Advanced Board Editor | Select the Display View | Edit View - Options | Global

Select the **Global** check box when information posted to a status board is to be displayed in all active incidents.

For example, assume the Significant Events board is configured as Global. Anytime an EOC is managing two separate incidents (for example, Hostage Situation and HazMat Spill), and data is posted to the Significant Events board, users logged into either incident (for example, Hostage Situation or HazMat) will see all data related to both incidents.

Lock User View

Advanced Board Editor | Select the Display View | Edit View - Options | Lock User View

Select the **Lock User View** option if you want the user to see only entries he or she adds to that status board. If two or more users are logged in to the same multi-user account, both see each other's entries but not those of any other user.

Lock Position View

Advanced Board Editor | Select the Display View | Edit View - Options |Lock Position View

Select the **Lock Position View** check box to restrict the users' view to only those entries added through the position they are currently filling.

Form

Advanced Board Editor | Select the Table | Edit Table - Options | Form

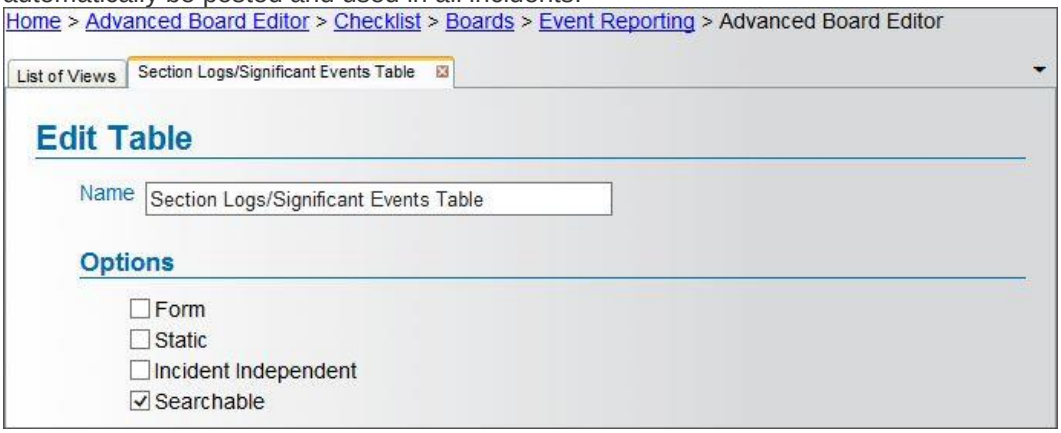
Select the **Form** option to allow the board to behave like a form. This enables the update-only function. A form-like board displays only the last update made to the board, per incident. The ICS and ESF Situation Reports that come standard with WebEOC are examples of the form boards. All updates to a form board are saved in the database for auditing purposes.

Note: Use of this option in conjunction with others such as Global means that there might be more than one entry per incident, but only one entry will be displayed at a time.

Static

Advanced Board Editor | Select the Table | Edit Table - Options | Static

Select the **Static** check box if this status board will be used to store precanned information that will automatically be posted and used in all incidents.



For example, an agency that routinely completes a set of tasks for any incident can configure the status board as Static, add the commitments to the specified status board through Setup, and with each new incident, the precanned entries will be automatically copied to the board. Static entries can be updated and processed as in any other board entry.

A **Delete** button is enabled in the input view for users with appropriate permissions logged in to Setup. This allows users to remove unwanted precanned entries by displaying the data item in the input view for the board, and selecting the Delete button.

Note: Entries added to Static status boards through the Setup incident are automatically duplicated (posted) in those boards for each subsequently created incident. Once the board has been built, the administrator can log in using Setup and add the precanned data items to the static board.

Incident Independent

Advanced Board Editor | Select the Table | Edit Table - Options | Incident Independent

Select the **Incident Independent** check box anytime the data entered to the status board is more permanent than the incident itself. This option allows data to remain in the board even after an incident through which it was entered is archived.

For example, a scenario where the incident-independent feature is useful is the *Shelters* board, which tracks status and related details on an ongoing basis. When configured as Incident Independent, all data entered across all incidents would continue to be maintained in the board when an incident is archived.

Searchable

The **Searchable** check box is selected by default. This enable data on this board to be included in search results when using the *WebEOC Search Tool*. The *Searchable* column in the *Boards* list window can quickly show you which boards have this option enabled or disabled.

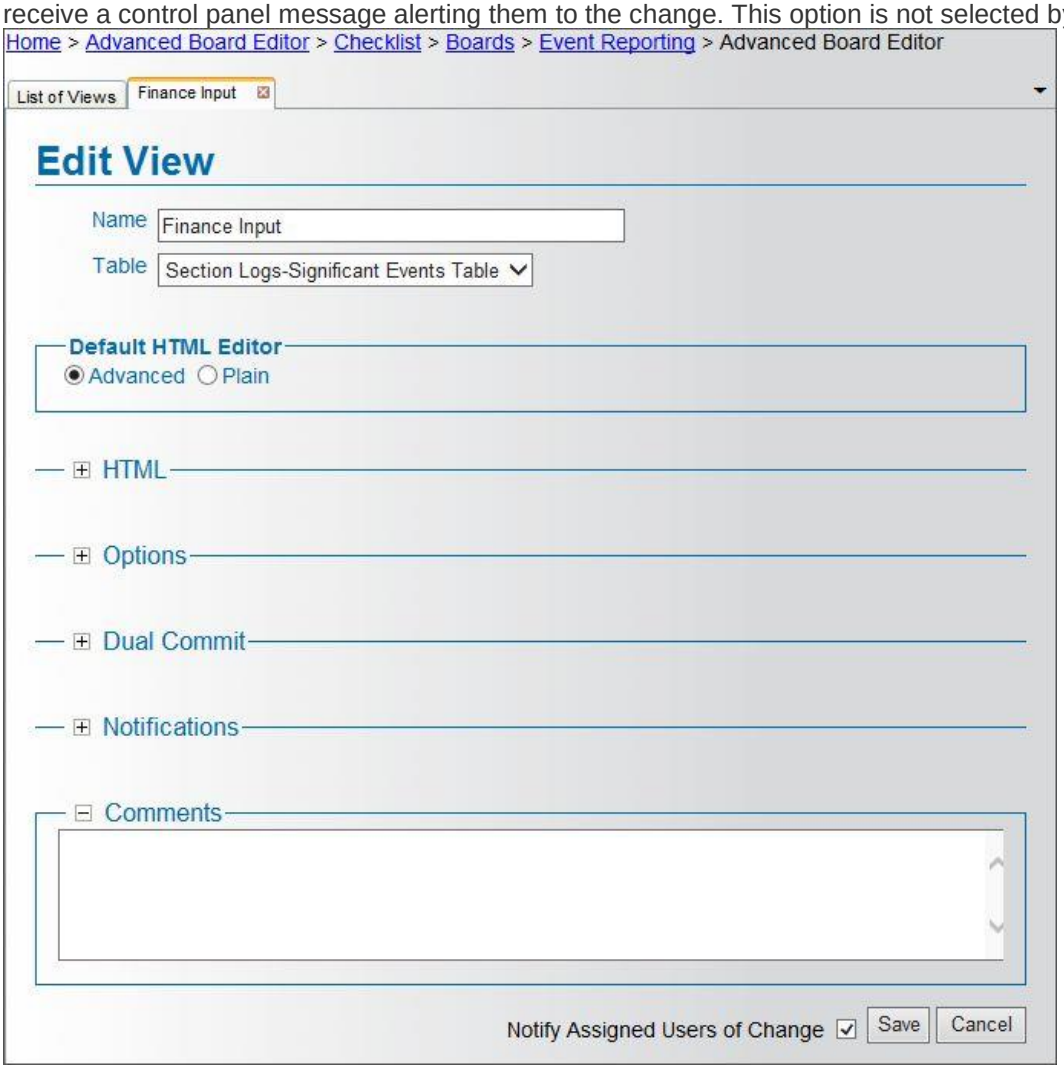
Advanced Board Building Dual Commit

The *Dual Commit* section allows you to configure a board to use the dual commit feature. The *Dual Commit* pane will be available if the board has only one input view. If the board has more than one input view, dual commit servers must be configured in the Edit View screen of the input view. *Dual Commit* servers are assigned by moving the server from the *Available* list to the *Assigned* list.

See the *Processes* topic for details on setting up *Dual Commit* servers for use.

Advanced Board Building Change Notifications

When a change is made to a board, you can select the **Notify Assigned Users of Chang**e check box and enter a notifications **message** in the *Comments* field. Every user that has permission to the board will receive a control panel message alerting them to the change. This option is not selected by default.



Adding and Editing an Input View

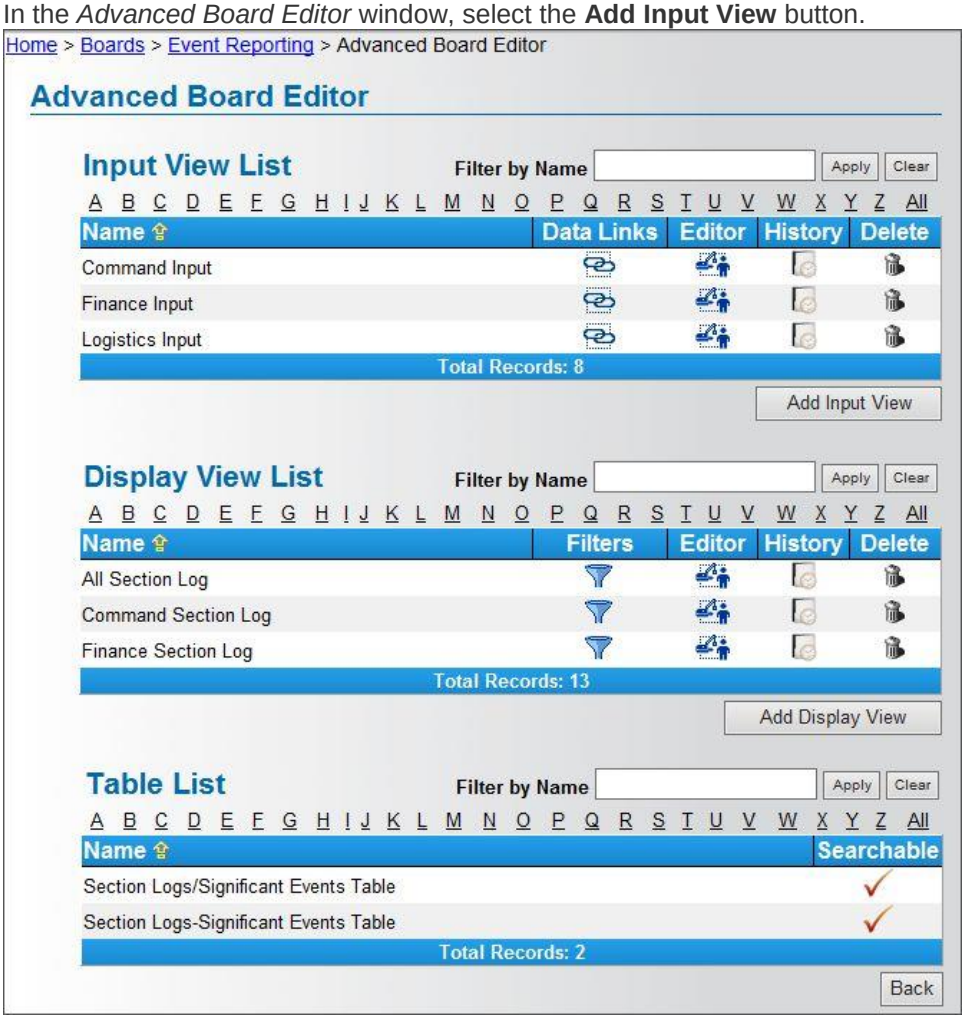
The Edit View window allows you to visually design and edit data entry (input) views that users will see and use to enter data.

To add a board input view, follow the steps below:

1. Select the **Boards** link in the *Process* section of the admin window.
2. In the *Boards* window, select the **board** you want to edit.

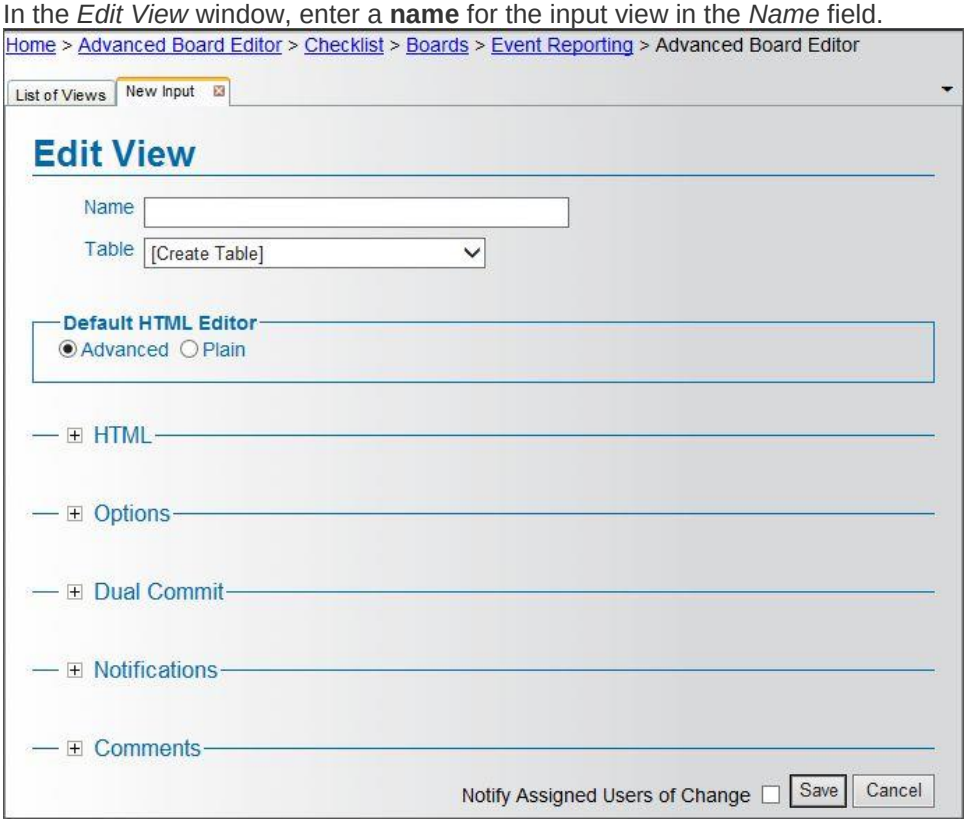
3. In the *Edit Board* window, select the **Advanced Board Editor** button.

4. In the *Advanced Board Editor* window, select the **Add Input View** button.



Note: If you are editing an existing input view, select the name of the view.

6. In the *Edit View* window, enter a **name** for the input view in the *Name* field.

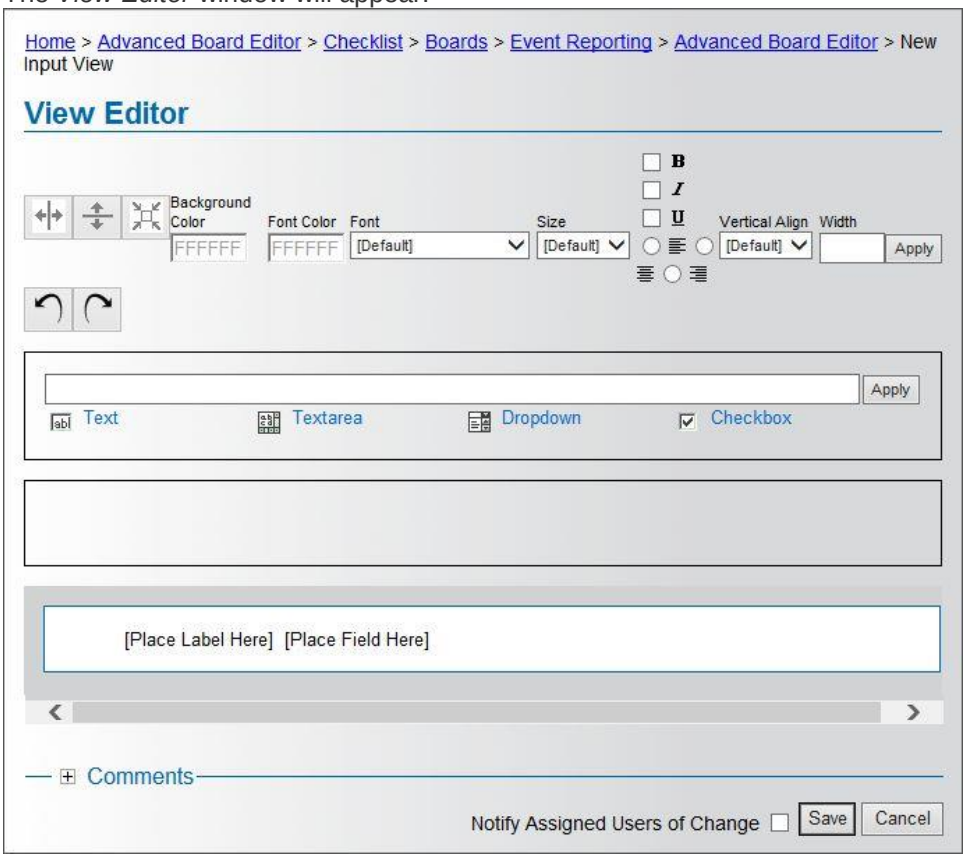


7. Select a **table** from the *Table* drop-down list, or select the **Create Table** option.

8. Select the **Save** button, and select the **List of Views** tab to return to the *Advanced Board Editor* window.

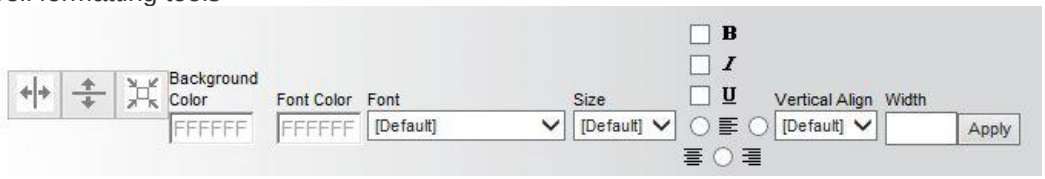
9. In the *Input View List*, select the **Editor icon** for the view you want to edit.

10. The *View Editor* window will appear.



The input *View Editor* window is comprised of four sections.

- Cell formatting tools



- Undo and Redo buttons

- Cell types and properties editing section

- Design pane. The design pane allows you to create the input view design, assign cell and formatting properties, and view a visual representation of the input view.

7. In the design pane, begin constructing the input view layout by selecting one of the baseline cells (Place Label Here, Place Field Here) and applying the Split Horizontal, Split Vertical, or Merge button. You must have a cell selected in order to apply the operation.

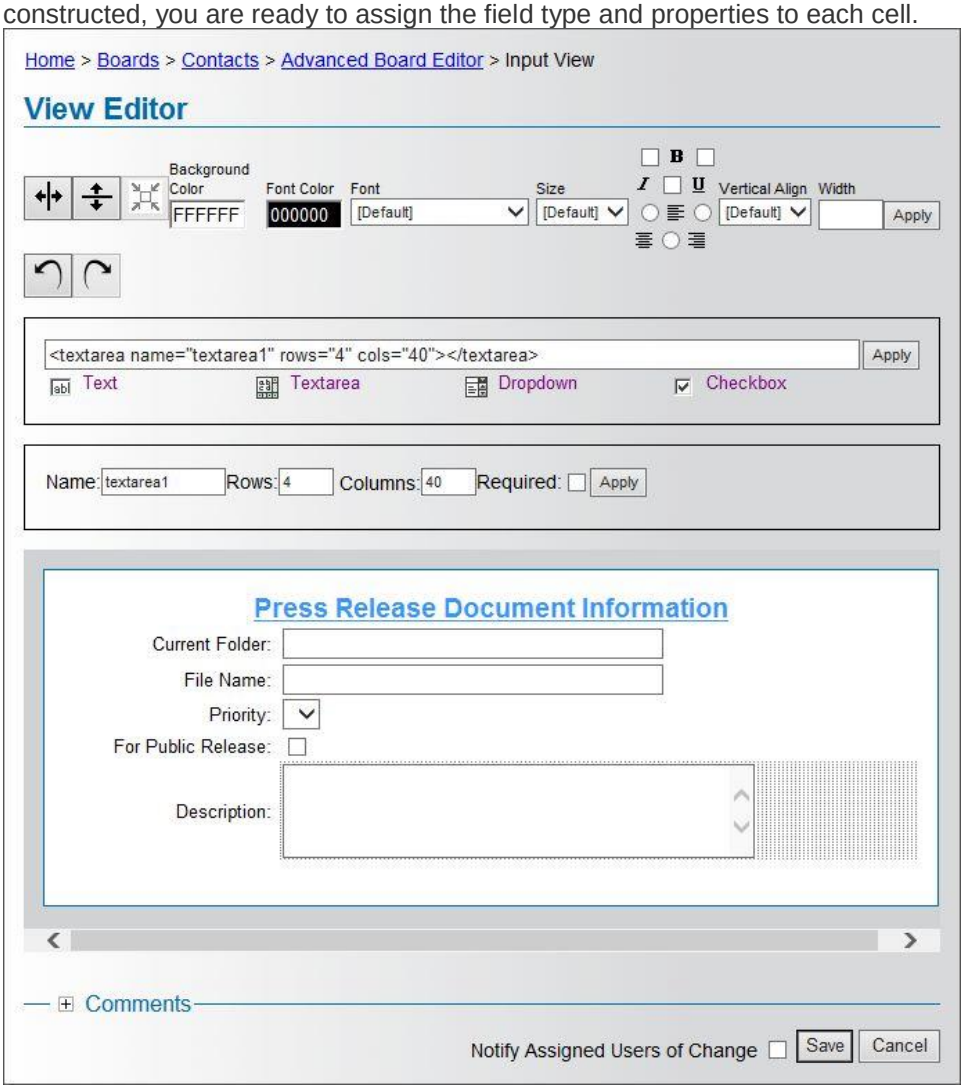
   a. To create a horizontal cell, select a **cell** and select the **Split Horizontal** button. This will split the single cell into two horizontal cells.

   b. To create a vertical cell, select a **cell** and select the **Split Vertical** button to split the cell into two vertical cells.

   c. To merge cells into a single cell, hold down the **Ctrl** key, select adjoining **cells** to form a rectangle, and select the **Merge** button.

Note: Merging cells will delete the contents of all of the selected cells with the exception of the upper left cell.

12. Continue to split and merge cells until you obtain your input layout. Once you have the layout constructed, you are ready to assign the field type and properties to each cell.



13. If the cell will be used as a label in the input view, perform the following.

    a. Select the **cell**.

    b. Enter a **name** for the label in the cell contents text field.

    c. Select the **Apply** button. You will see the label appear in the *Place label here* cell.

14. If the cell will be used as a data field in the input view, name the cell by performing the following.

    a. Select the **cell**.

    b. Enter a unique **name** for the field (this will be used in the database) in the field properties section.

Note: Ensure all field name declarations are unique so that you can easily identify them when building your display view.

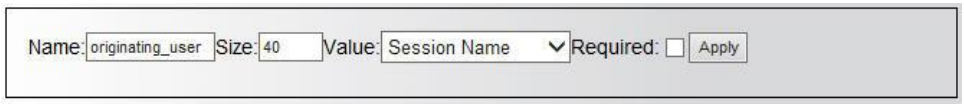
c. Select the **Apply** button.

15. When the name for the field is set, perform one of the following to set the field type for each cell.

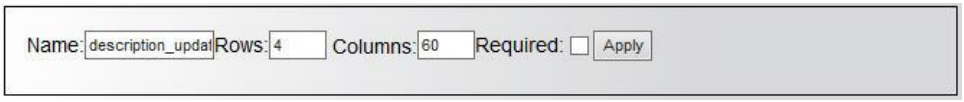
a. Select the **field**.

b. Select a **field type**, and set any additional cell properties required. The type of field selected determines what field properties are available.

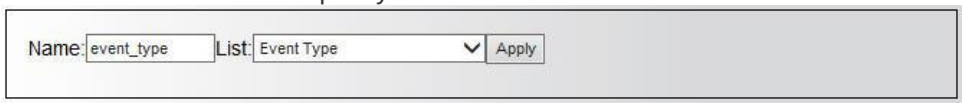
1. **Text** - Displays a single line of text. You will need to set additional cell values for the text field.



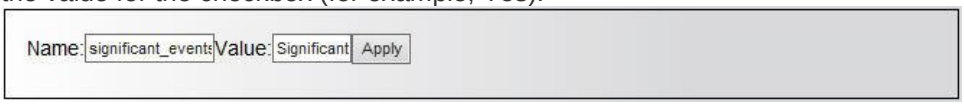
2. **Textarea** - Displays multiple lines of text. A scroll bar is available to view inputs that exceed the row count set for the field. You will need to set additional cell values for the textarea field.



3. **Dropdown**- Presents a selection (drop-down) list of items. You will need to set additional cell values and specify the list to be used.



4. **Checkbox** - Allows a user to mark a selection or selections. You will need to set the value for the checkbox (for example, Yes).



5. **File Attachment** - Adds the ability to browse and add an attachment to a board entry.

6. **Save Button** - Adds a Save button to the input view.

7. **Return Button** - Adds a Return button to the input view. When clicked, it returns the user to the previous screen.

8. **Spell Check** - Adds the Spell Check button. When clicked, the WebEOC spell check feature is enabled.
9. **View Link** - Adds the View Link button to the input view. When clicked, it opens the board view specified.

16. When you have configured the cells (label or field), edit the appearance of the fields by using the cell formatting tools.
    a. Select the **field**.
    b. To change the background color of a selected **cell**, select the **Background Color** field, enter a **hexadecimal color code** or choose the color from the palette, and select the **OK** button.
    c. To change the text color of the selected **cell**, select the **Foreground Color** field, enter a **hexadecimal color code** or choose the color from the palette, and select the **OK** button.
    d. To set the font for the text, select the **Text Font** drop-down list and select the **font name**.
    e. To set the size for the text, select the **Text Size** drop-down list to select the **point size** for all selected cells.
    f. Set the style for the text by selecting (**B**) Bold, (**I**) Italic, or (**U**)Underlined for the selected cell.
    g. Select the **Left Justify**, **Center Justify**, or **Right Justify** radio button to set the text alignment.
    h. Set the alignment for the text in the cell by selecting **Top**, **Middle**, **Bottom**, or **Default** from the *Vertical Align* drop-down list.

Note: The Default alignment setting relates to the alignment specified through the HTML written in an external editor and imported to a board. The default setting in this case can be overridden by selecting Top, Middle, or Bottom in the Edit View window.

    i. To set the width of the cell, enter a **number** with a unit in the *Width* field, and select the **Apply** button.

Note: Valid units include the percent symbol (%), inches (in), centimeters (cm), or pixels (px).

Deleting an Input View

To delete an input view, follow the steps below.

1. In the *Advanced Board Editor* window, select the **trash can icon** next to the input view you want to delete.
2. When the delete confirmation dialog box appears, select the **OK** button to permanently delete the input view, or select the **Cancel** button to abort the operation.

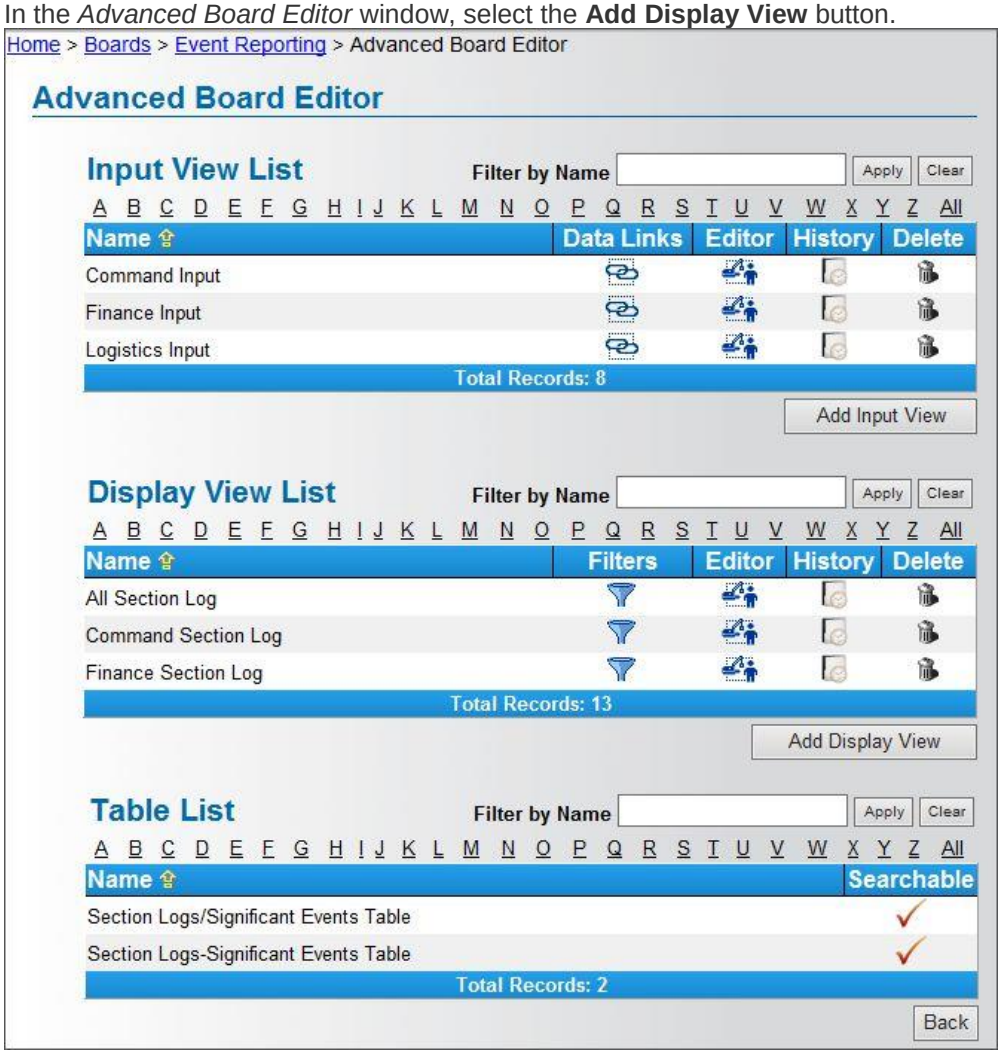
Adding and Editing a Display View

The Edit View window allows you to visually design and edit board display views that users will view from their control panel.

To add a board display view, follow the steps below.

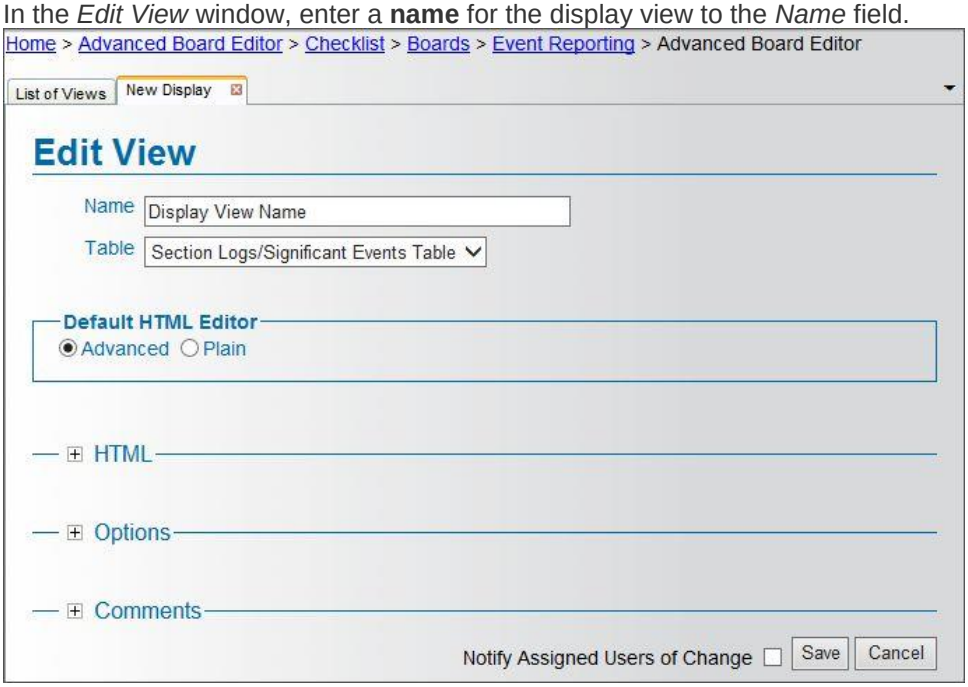
1. Select the **Boards** link in the *Process* section of the admin window.
2. In the *Boards* window, select the **board** you want to edit.
3. In the *Edit Board* window, select the **Advanced Board Editor** button.

4. In the *Advanced Board Editor* window, select the **Add Display View** button.



Note: If you are editing an existing display view, select the name of the view

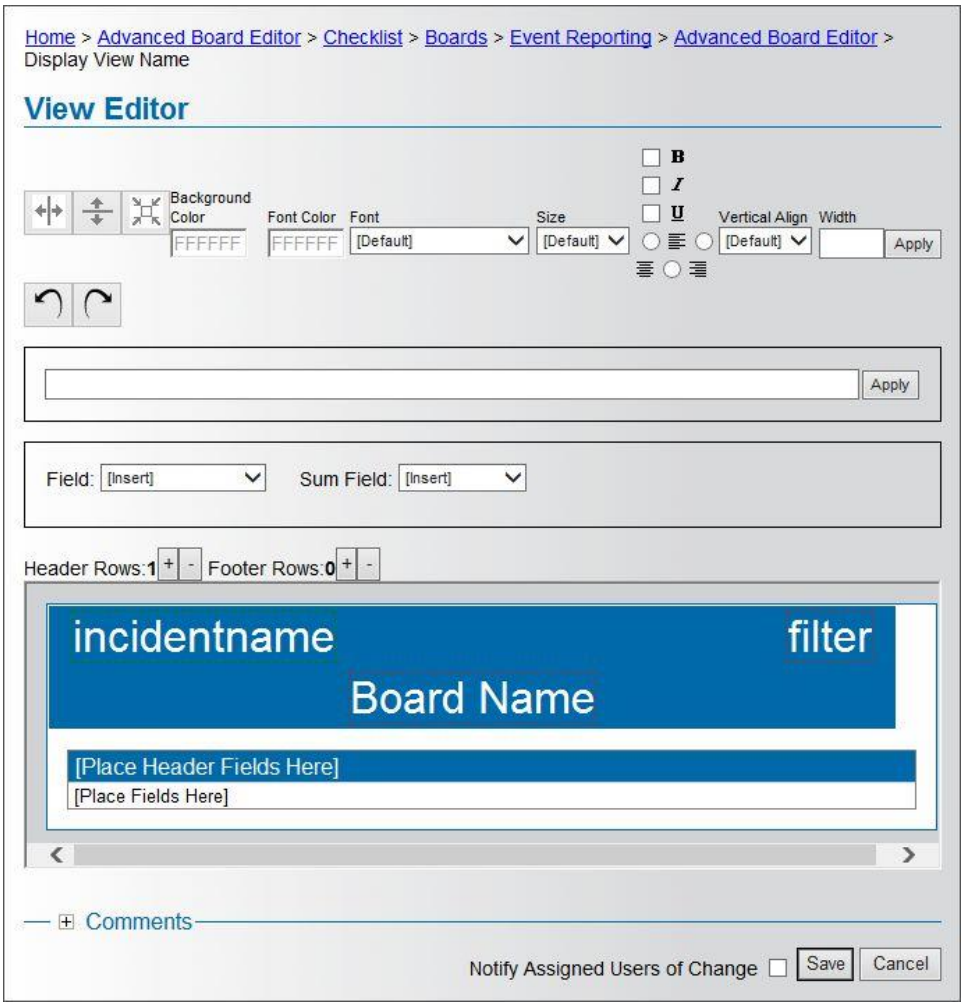
5. In the *Edit View* window, enter a **name** for the display view to the *Name* field.



6. Select a **table** from the *Table* drop-down list, or select the **Create Table** option.

7. Select the **Save** button, and select the **List of Views** tab to return to the *Advanced Board Editor* window.

8. In the display *View List*, select the **Editor** icon for the view you want to edit. The display *View Editor* window will appear.

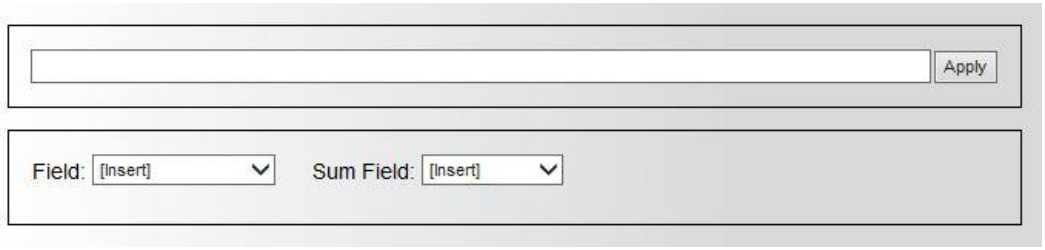


The display *View Editor* window is comprised of four primary sections:

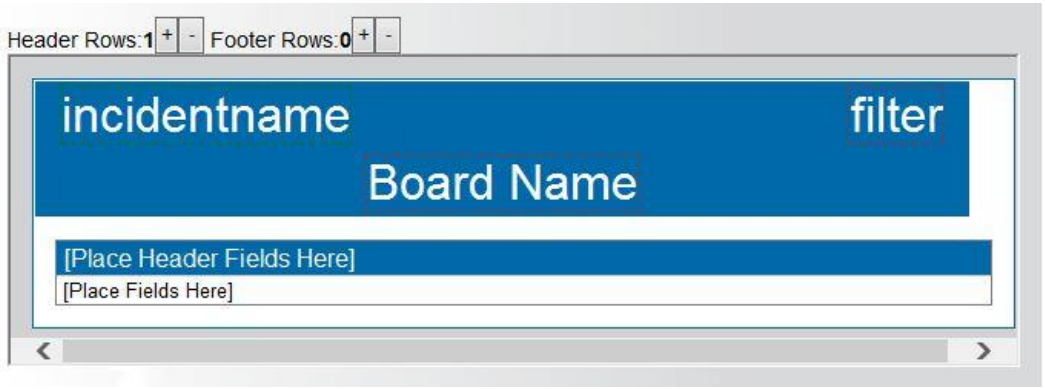
- Cell formatting tools

- Undo and Redo buttons

- Cell types and properties editing section



- Design pane: The design pane allows you to create the display view design, assign cell and formatting properties, and view a visual representation of the display view.



9. In the design pane, begin constructing the display view layout by selecting one of the baseline cells and applying the Split Horizontal, Split Vertical, or Merge button. You must have a cell selected in order to apply the operation.

   a. To create a horizontal cell, select a **cell** and select the **Split Horizontal** button. This will split the single cell into two horizontal cells.

   b. To create a vertical cell, select a **cell** and select the **Split Vertical** button to split the cell into two vertical cells.

   c. To merge cells into a single cell, hold down the **Ctrl** key, select adjoining **cells** to form a rectangle, and select the **Merge** button.

Note: Merging cells will delete the contents of all of the selected cells with the exception of the upper left cell.

   d. Display views may be designed to use fixed header and footer rows, similar to a spreadsheet: To increase or decrease the number of header or footer rows, use the

Header Rows and Footer Rows plus (+) and minus (-) buttons located just above the Design Pane. If no header or footer rows will be used, set the values to 0 (zero).

10. Continue to split and merge cells until you obtain your display layout. After the layout has been constructed, you are ready to assign the field type and properties to each cell.

11. If the cell will be used as a label in the display view, perform the following.

    a. Select the **cell**.

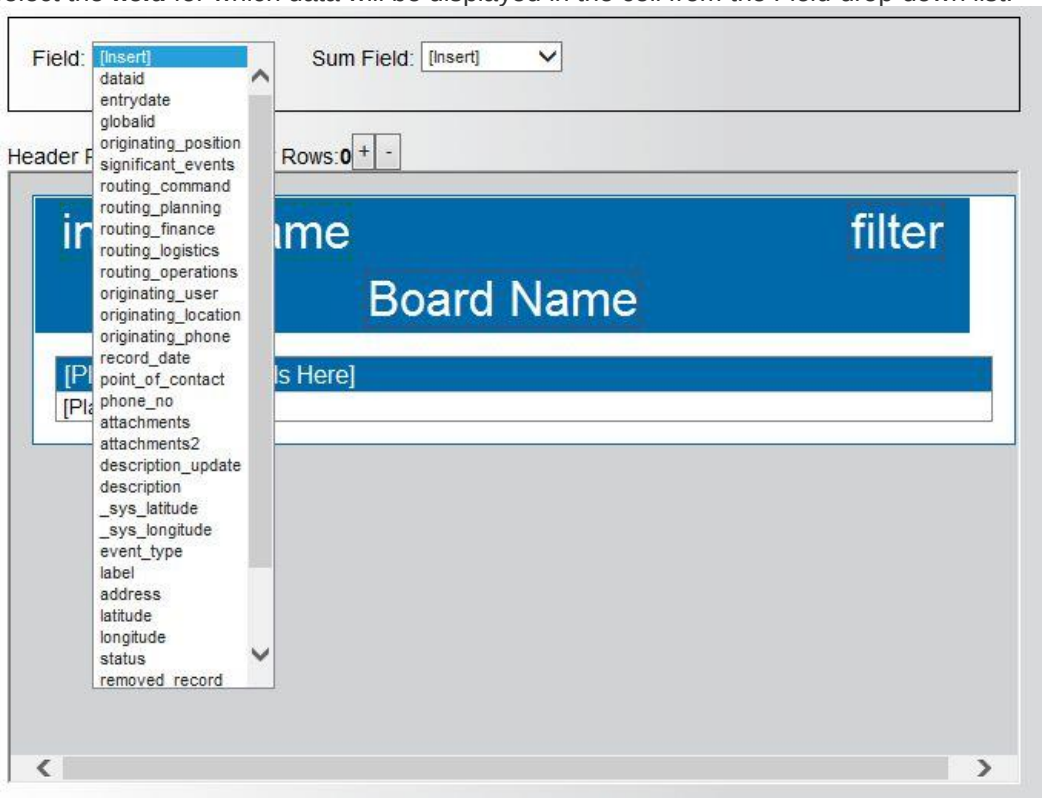
    b. Enter a **name** for the label in the cell contents text field.

    c. Select the **Apply** button. You will see the label appear in the *Place label here* cell.

12. If the cell will be used to display information in the display view, perform the following.

    a. Select the **cell**.

    b. Select the **field** for which data will be displayed in the cell from the *Field* drop-down list.



    c. Select the **Apply** button.

    d. Repeat steps a. through c. for each data field.

13. When you have configured the cells (label or field), edit the appearance of the fields by using the cell formatting tools.

    a. Select the **field**.

    b. To change the background color of a selected cell, select the **Background Color** field, enter a **hexadecimal color code** or choose the color from the palette, and select the **OK** button.

    c. To change the text color of the selected cell, select the **Foreground Color** button, enter a **hexadecimal color code** or color from the palette, and select the **OK** button.

    d. To set the font for the text, select the **Text Font** drop-down list and select the **font name**.

    e. To set the size for the text, select the **Text Size** drop-down list to select the **point size** for all selected cells.

    f. Set the style for the text by selecting (**B**) Bold, (**I**) Italic, or (**U**)Underlined for the selected cell.

    g. Select the **Left Justify**, **Center Justify**, or **Right Justify** radio button to set the text alignment.

    h. Set the alignment for the text in the cell by selecting **Top**, **Middle**, **Bottom**, or **Default** from the *Vertical Align* drop-down list.

Note: The Default alignment setting relates to the alignment specified through the HTML written in an external editor and imported to a board. The default setting in this case can be overridden by selecting Top, Middle, or Bottom in the Edit View window.

    i. To set the width of the cell, enter a **number** with a unit in the *Width* field, and select the **Apply** button. Valid units include the percent symbol (%), inches (in), centimeters (cm), or pixels (px).

14. After you have finished building the display view, select the Save button. You will return to the Advanced Board Editor window.

Deleting a Display View

To delete a display view, follow the steps below.

1. In the *Advanced Board Editor* window, select the **trash can icon** next to the display view you want to delete.

2. When the delete confirmation dialog box appears, select the **OK** button to permanently delete the display view, or select the **Cancel** button to abort the operation.

View History

In the Advanced Board Editor window, each input and display view includes a History icon. Selecting the History icon links you to the history for that view. Each time a view is saved, an historical copy of the view is stored and added to list on the View History page.

View History provides the following features.

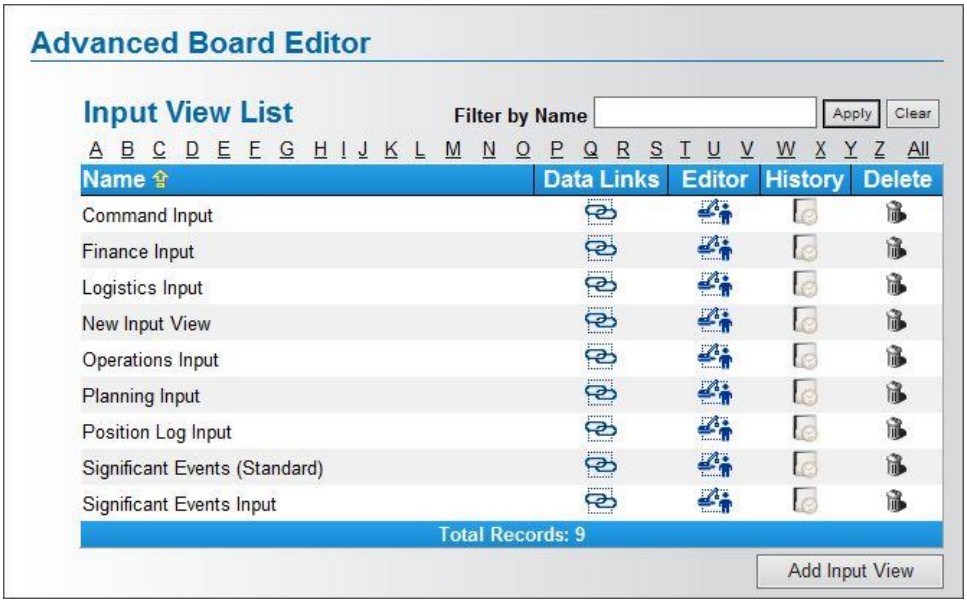
- Each historical copy of a view can be viewed, deleted, or restored.
- With each save of a view, a copy of the view is stored along with a record of the date/time, comments, errors, and user that modified the view.
- Within the View History, any record of a view, with the exception for the current one, can be deleted.
- Restoring a view makes it the current/active view.
- When a user restores a view, a new history record with an updated timestamp is created.

Viewing History

To access the history of a view, follow the steps below.

1. Select the **Boards** link in the *Process* section of the admin window.
2. In the *Boards* window, select the **name** of the board for which you want to review the history.
3. In the *Edit Board* window, select the **Advanced Board Editor** button.

4. In the *Advanced Board Edit* window, select the **History** icon next to the desired input or display view. The *View History* window displays a complete list of the historical copies (records) for the view.

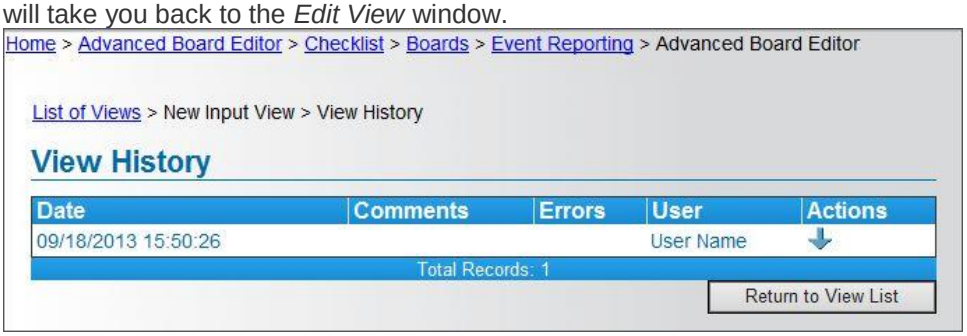


Restoring History

To restore a historical copy of the view, follow the steps below.

1. Select the **History** icon next to the desired input or display view. The *View History* window displays a complete list of historical copies of the view.

2. In the Actions column, select the **down arrow** for the historical copy that you want to restore. This will take you back to the *Edit View* window.



3. Scroll to the bottom of the *Edit View* window and select the **Restore** button. This will make the historical copy the current view. To abort the operation, select the **Cancel** button. After restoring a view, a new history record with an updated timestamp is created.

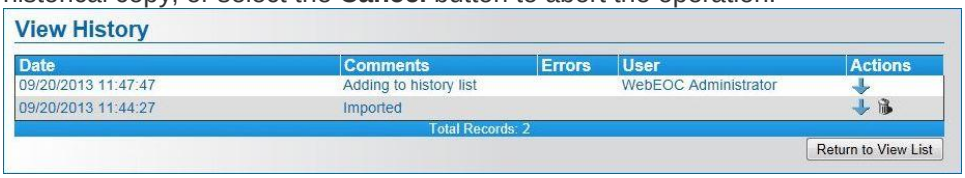
Deleting History

You cannot delete the history of the current view. You must first restore a different view.

To delete an historical copy of a view, follow the steps below.

1. In the *View History* window, select the **trash can icon** next to the historical copy of the view you want to delete.

2. When the delete confirmation window appears, select the **OK** button to permanently delete the historical copy, or select the **Cancel** button to abort the operation.



Data Linking

Data linking streamlines the process of posting data to multiple status boards by allowing you to send information from one status board to another. It also ensures information integrity across multiple boards.

One-way and two-way data linking are supported in WebEOC.

By default, data linking is set to 1-Way Data Linking.

- One-way data linking - In this scenario, Board A is linked to Board B. Updates to data linked in Board A update Board B, but updates to data-linked fields in Board B do not update in Board A.

- Two-way data linking - In this scenario, Board A is linked to Board B. Updates to data linked in Board A update Board B, and updates to data-linked fields in Board B will update the linked entry in Board A.

Changes made to a data-linked entry will be replicated on each board to which that data item has been linked.

Rules for linking data between boards are built and stored in the Advanced Board Editor utility of the Boards manager. A board can be linked to as many boards as you have, or not linked at all.

One data link template is added for each board to which it will link data. The WebEOC administrator maps the fields in the source board to specified fields in the target boards.

For each data link template that is set up, a Data Link checkbox is added to the input view of the source board.

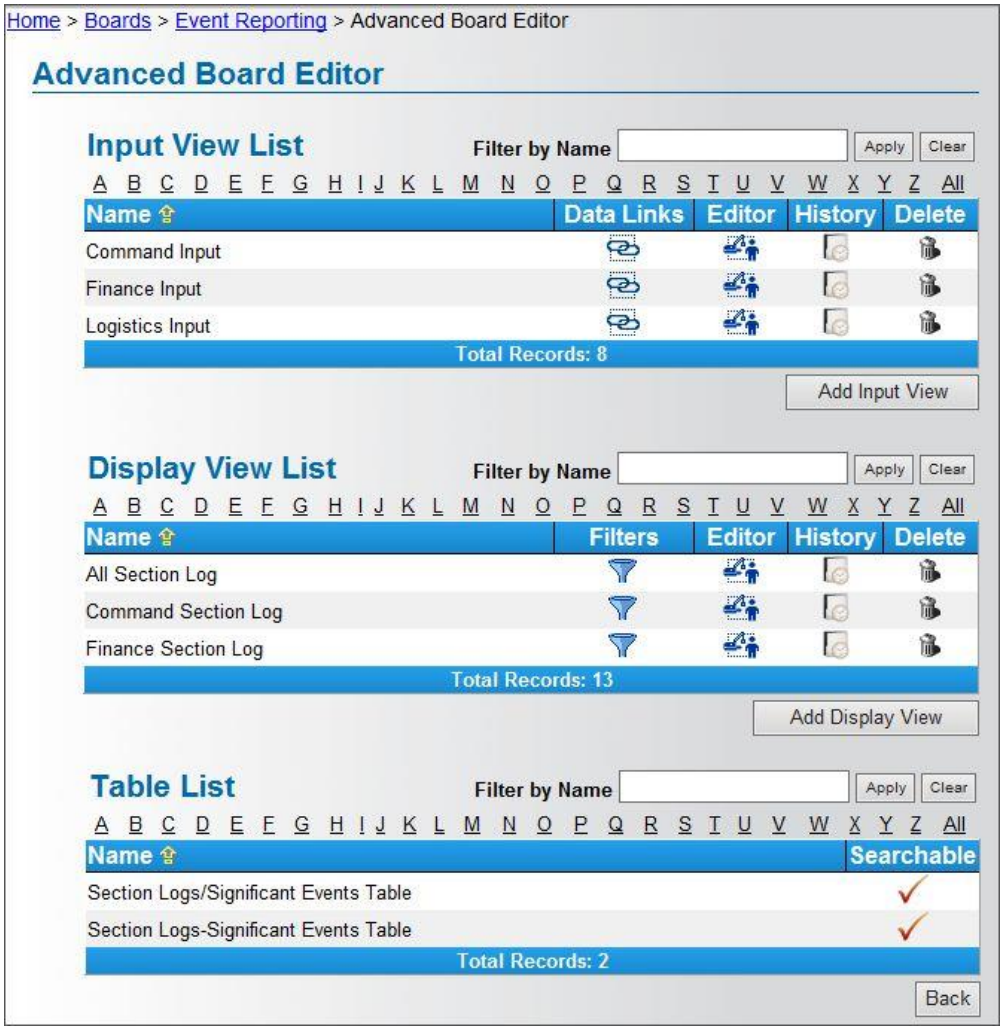
Adding and Editing a Data Link

To add a new data link, follow the steps below.

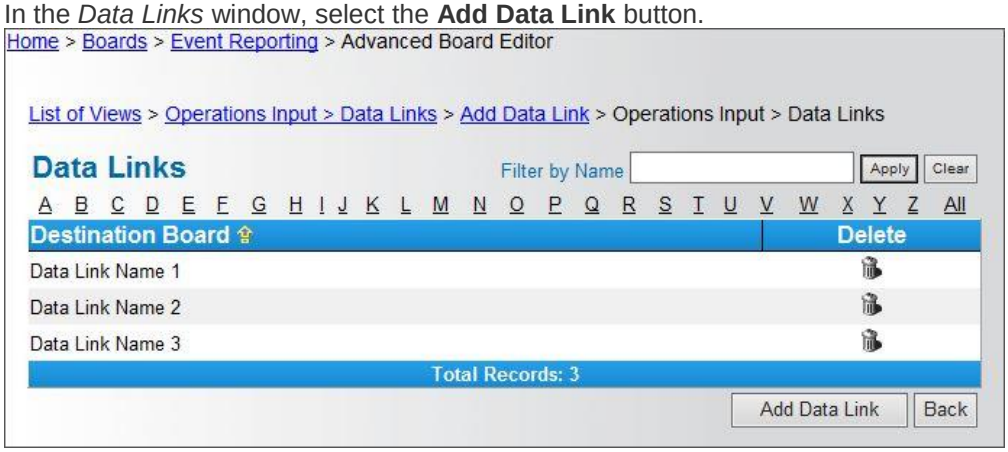
1. Select the **Boards** link in the *Process* section of the admin window.
2. Select the **board** in the *Boards* window.
3. In the *Board Edit* window, select the **Advanced Board Editor** button.

Note: If enabled, you can select the Edit Data Links button if enabled. If the board has multiple input and display views, the Edit Data Links button will be grayed out.

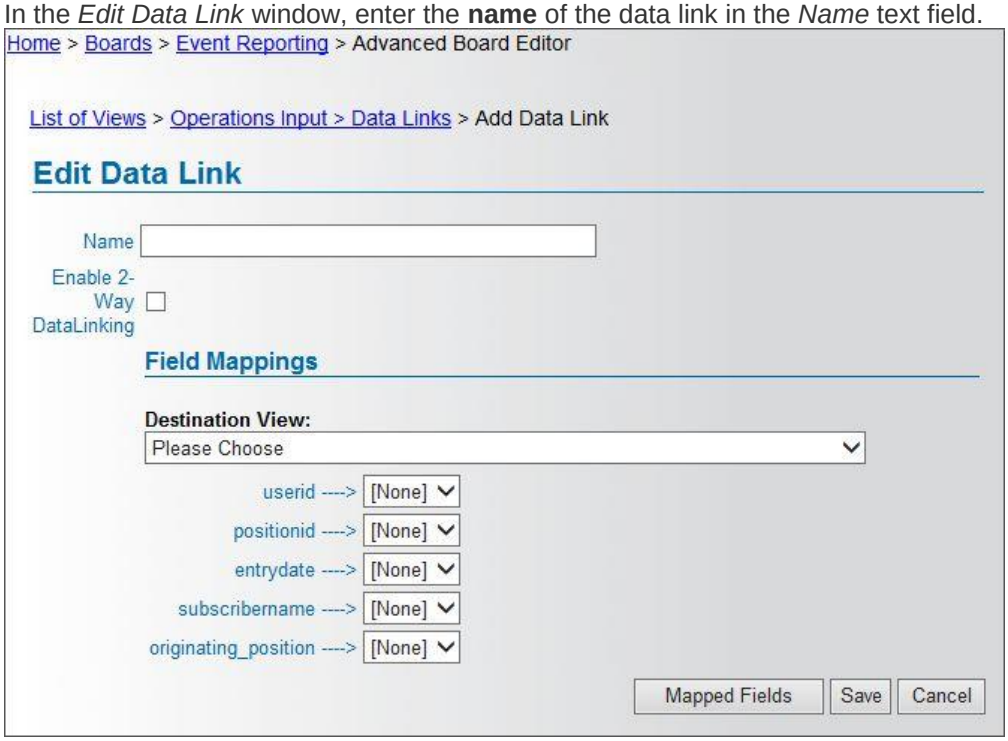
4. In the *Advanced Board Editor* window, select the **Data Links** icon next to the input view you want to add a data link.



5. In the *Data Links* window, select the **Add Data Link** button.


Home > Boards > Event Reporting > Advanced Board Editor
List of Views > Operations Input > Data Links > Add Data Link > Operations Input > Data Links
Data Links
Filter by Name
Apply
Clear
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All
Destination Board
Delete
Data Link Name 1
Data Link Name 2
Data Link Name 3
Total Records: 3
Add Data Link
Back

6. In the *Edit Data Link* window, enter the **name** of the data link in the *Name* text field.



7. If you want to enable 2-Way Data Linking, select the **check box**. Leave it blank to maintain one-way data linking for this rule.

8. Select the target **display view** from the *Destination View* drop-down list.

9. Once the destination view is selected, you can map the fields in the source board to available fields in destination view you selected. The fields that are available to data-link from a source board to any text-type field in a destination board are considered *Field Mappings*.

Automatic Field Mapping

If your destination field names match the source field names, select **Mapped Fields** to automatically data-link those fields.

Custom Field Mapping

In some cases, you will want to map a field that has a different name on the destination board than it had on the originating board.

To map a custom field, follow the steps below.

1. For each field in *Field Mappings*, select the **field** in the drop-down list to which the data will be mapped.

2. If you do not wish to map a field, use the default selection (**None**) in the drop-down list.
3. Select the **Save** button to save the rule, or select the **Cancel** button to abort the operation.

Deleting a Data Link

To delete a data link, follow the steps below.

1. In the *Input View List* section of the *Advanced Board Editor* window, select the **data link icon** of the input view from which you want to delete a data link rule.
2. In the *Data Links* window, select the **trash can icon** next to the data link you want to delete.
3. When the delete confirmation window appears, select the **OK** button to permanently delete the data link, or select the **Cancel** button to abort the operation.

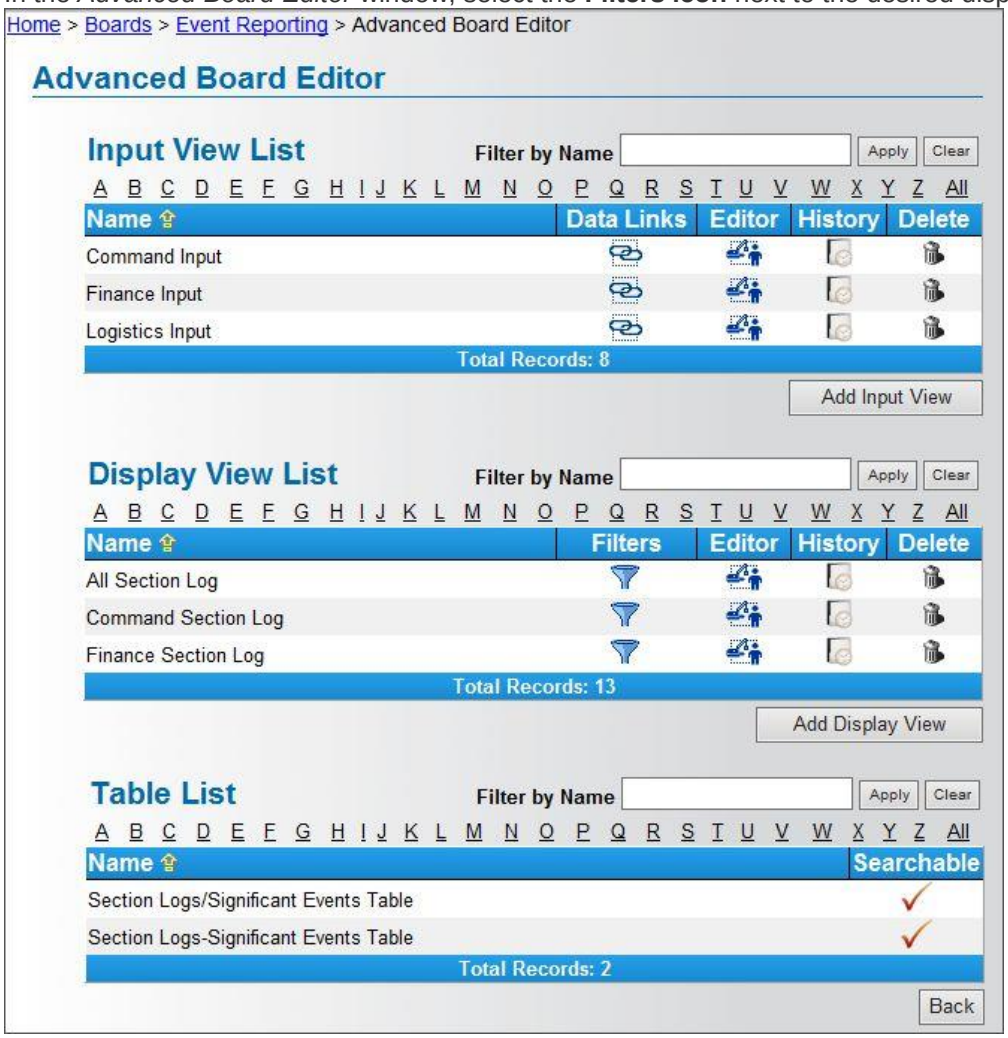
Adding and Editing a Board Filter

Board filters can be configured using standard board builder tools. Board filters are designed using Boolean logic outside of a view and may be selectively applied or removed through the use of buttons in the board display. Filters can be designated as “always on” or “optional” and are exported and/or imported with the board.

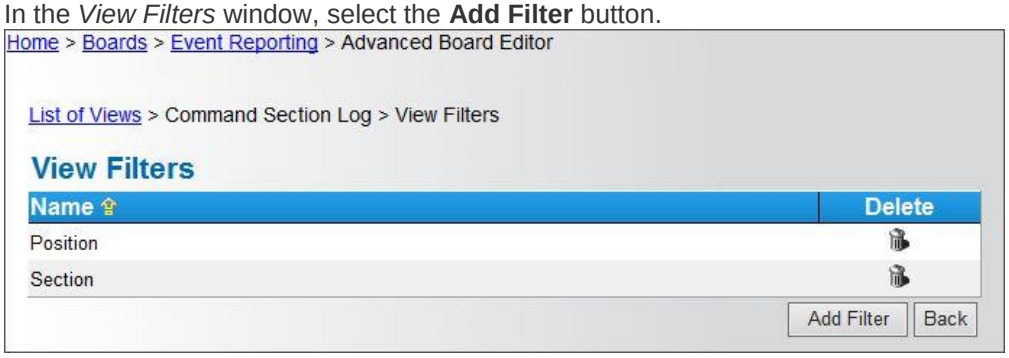
To add a board filter, follow the steps below.

1. Select the **Boards** link in the *Process* section of the admin window.
2. Select the **name** of the board you want to add a filter to.
3. In the *Edit Board* window, select the **Advanced Board Editor** button.

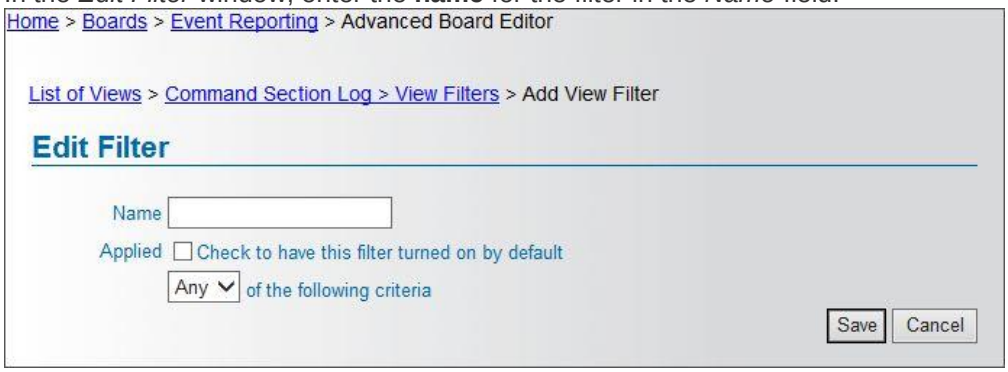
4. In the *Advanced Board Editor* window, select the **Filters icon** next to the desired display view.



5. In the *View Filters* window, select the **Add Filter** button.



6. In the *Edit Filter* window, enter the **name** for the filter in the *Name* field.


Home > Boards > Event Reporting > Advanced Board Editor
List of Views > Command Section Log > View Filters > Add View Filter
Edit Filter
Name
Applied
Check to have this filter turned on by default
Any
of the following criteria
Save
Cancel

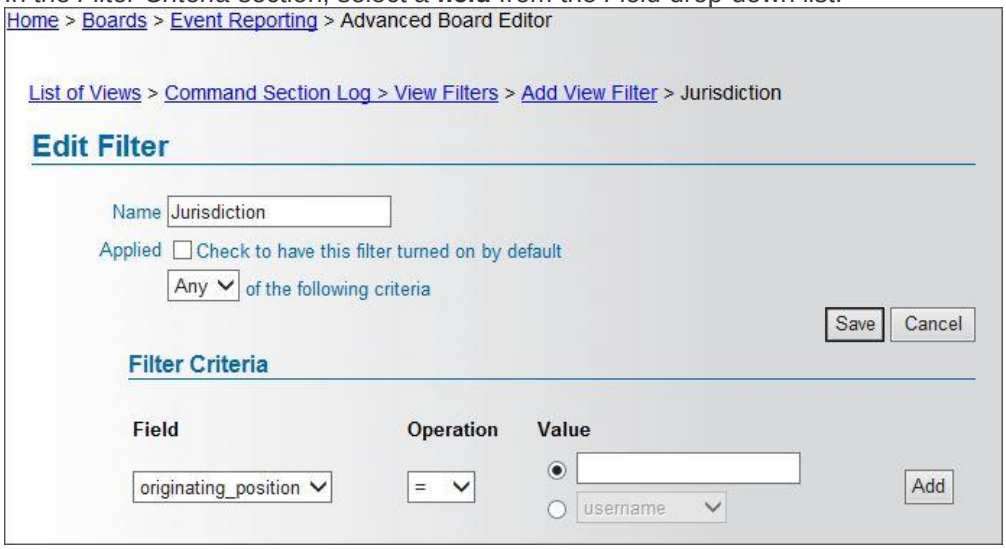
7. To turn the filter on by default, select the **Applied** check box.

8. Select one of the following choices from the criteria drop-down list.

   - Any - one or more of the criteria must be met
   - All - all criteria must be met

9. Select the **Save** button to continue creating the filter, or select the **Cancel** button to abort the operation.

10. In the *Filter Criteria* section, select a **field** from the *Field* drop-down list.



11. Select an **operation** from the *Operation* drop-down list. The contents of the *Operation* drop-down list are determined by the field type configured for the selected field.

12. Either enter a **value** in the *Value* text box, or select the **second radio button** to select a value from the *Value* drop-down list. The contents of the *Value* drop-down list is determined by the field type and operation selected.

13. Select the **Add button** to add the filter criteria.

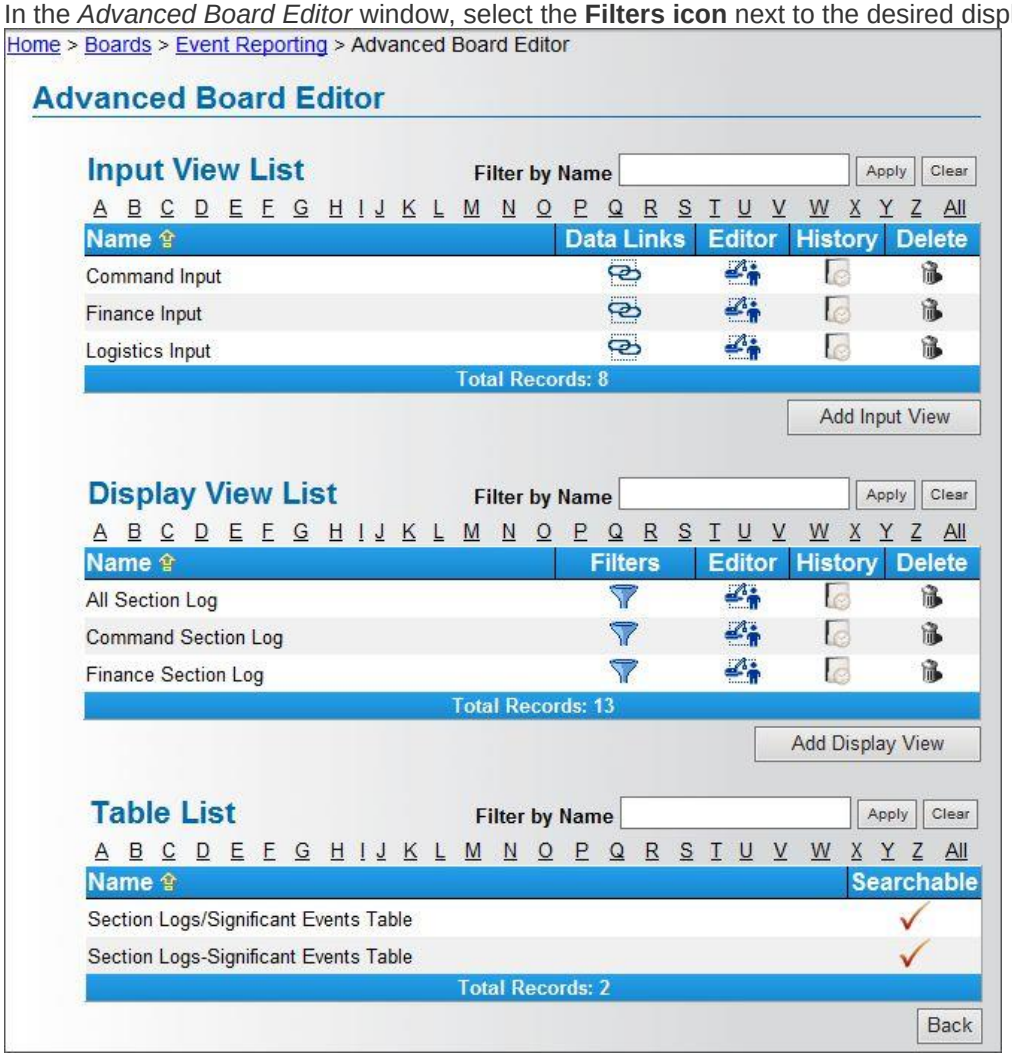
14. Repeat steps 11-13 to add additional filters to the display view.

15. Select the **Save** button to save the filter, or select the **Cancel** button to abort the operation.

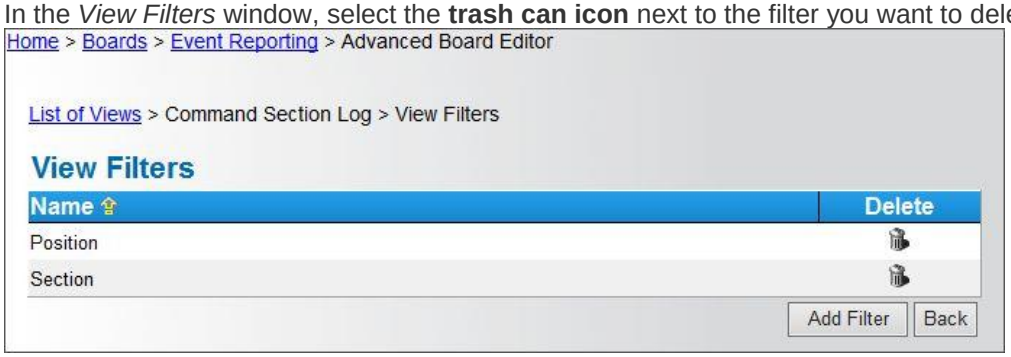
Deleting a Board Filter

To delete a board filter, follow the steps below.

1. In the *Advanced Board Editor* window, select the **Filters icon** next to the desired display view.



2. In the *View Filters* window, select the **trash can icon** next to the filter you want to delete.



3. When the delete confirmation window appears, select the **OK** button to permanently delete the filter, or select the **Cancel** button to abort the operation.

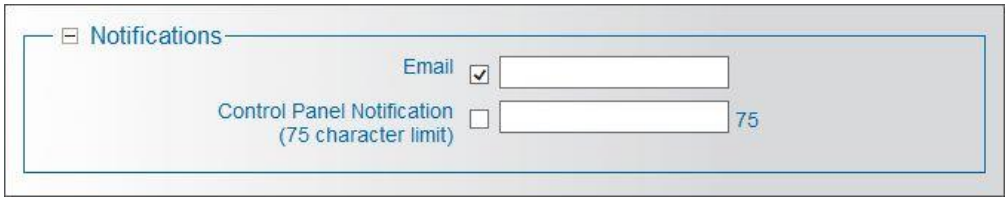
Configuring a Board for Email

Notification-type boards can be email enabled to notify users outside of WebEOC. When configured for emails, email subject and content are created from a status board entry.

An email server must be configured in the General manager in order to enable the email function. See the System topic for detailed instructions on setting up your email server.

To configure a board for email, follow the steps below:

1. Select the **Boards** link in the *Process* section of the admin window.
2. Select the **name** of the board intended for email configuration.
3. Select the **Advanced Board Editor** button in the *Tools* section.
4. Select the **name** of the input view to be configured in the *Advanced Board Editor* window.
5. In the *Edit View* window, scroll down and select **Notifications** to expand the field.
6. Select the **Email check box**.



7. Enter the **email addresses** of all recipients to whom an email will automatically be sent as each new or updated entry is posted to the board. Multiple email address can be entered separated by a comma only. Do not enter spaces. You can also use an email distribution list.

8. Select the **Save** button.

Note: The following steps may also be performed through Board Wizard if the board has a single input view.

9. In the *Advanced Board Editor* window, select the **Editor icon** for the input view.
10. For each field that will be used to enter **ad hoc email addresses** in the *Data Entry* window, follow the steps below: Multiple email addresses or distribution lists can be entered separated by a comma.
    a. Select the **field**.
    b. Select the **Recipient check box**.
    c. Select the **Apply button**.
11. For each field that will be part of the subject line of the mail, follow the steps below.
    a. Select the field.
    b. Select the Subject check box.
    c. Select the Apply button.
12. For each field that will be part of the email message, follow the steps below.
    a. Select the field.
    b. Select the Message check box.
    c. Select the Apply button.
    d. Select the Save button.

Note: If multiple fields are configured as "Subject" or "Message," specified fields will be respectively concatenated (combined together) to form the Subject or Message portion of the email as applicable.

Multiple email options can be applied to a field (for example, a single field can be part of both the *Subject* and *Body* of the email).

Configuring a Board to Display Control Panel Messages

Status boards in WebEOC can be configured to generate a pop-up message on the control panel, similar to the new message indicator, as new entries or updates are posted. The advisory can be sent to any users currently logged into WebEOC. This is a useful feature that can be added to select boards to alert

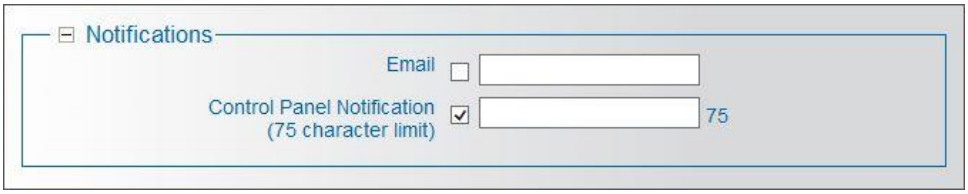
users that a new or updated entry has been posted. For example, this capability could be added to a mission task board to alert users of a new task.

To add the pop-up messages capability to a board, follow the steps below.

1. Select the **Boards** link in the *Processs* section of the admin window.
2. Select the **name** of the board to be configured for the control panel notification.
3. Select the **Advanced Board Editor** button in the *Tools* section.

Note: The following steps may also be performed through the Board Wizard if the board has a single input view.

4. Select the **name** of the input view that you want to configure for sending pop-up messages.
5. In the *Edit View* window, scroll down and select **Notifications** to expand the field. Select the **Control Panel Notification check box**.



6. Enter the **pop-up message text** that will appear on the control panel in the text field.
7. Select the **Save** button to save the messages setting, or select the **Cancel** button to abort the operation.
8. In the *Advanced Board Editor* window, select the **Editor icon** for the input view you just added the messages capability to.
9. Configure each field that will be designated as a receiver of the control panel notification to Receiver. To designate a field as a *Receiver* field, follow the steps below.
    a. Select the **field** you want to designate as a *Receiver* field.
    b. Select the **Receiver check box**.
    c. Select the **Apply button**.

Note: The Receiver can be a WebEOC user. It is customary to designate a drop-down field that utilizes the built-in users list so users do not have to enter the user name. If the pop-up advisory is to be sent to multiple users, you must add the appropriate number of fields.

10. Configure each field that will be included in the text portion of the notification to Notification. To designate a field as a notification, follow the steps below.

    a. Select the **field** you want to designate as a notification field.

    b. Select the **Notification** check box.

    c. Select the **Apply** button.

Note: If multiple fields are configured as Notification, specified fields will be concatenated (combined together) to form the pop-up advisory on the control panel.

11. Select the **Save button** to save the messages settings, or select the **Cancel button** to abort the operation.

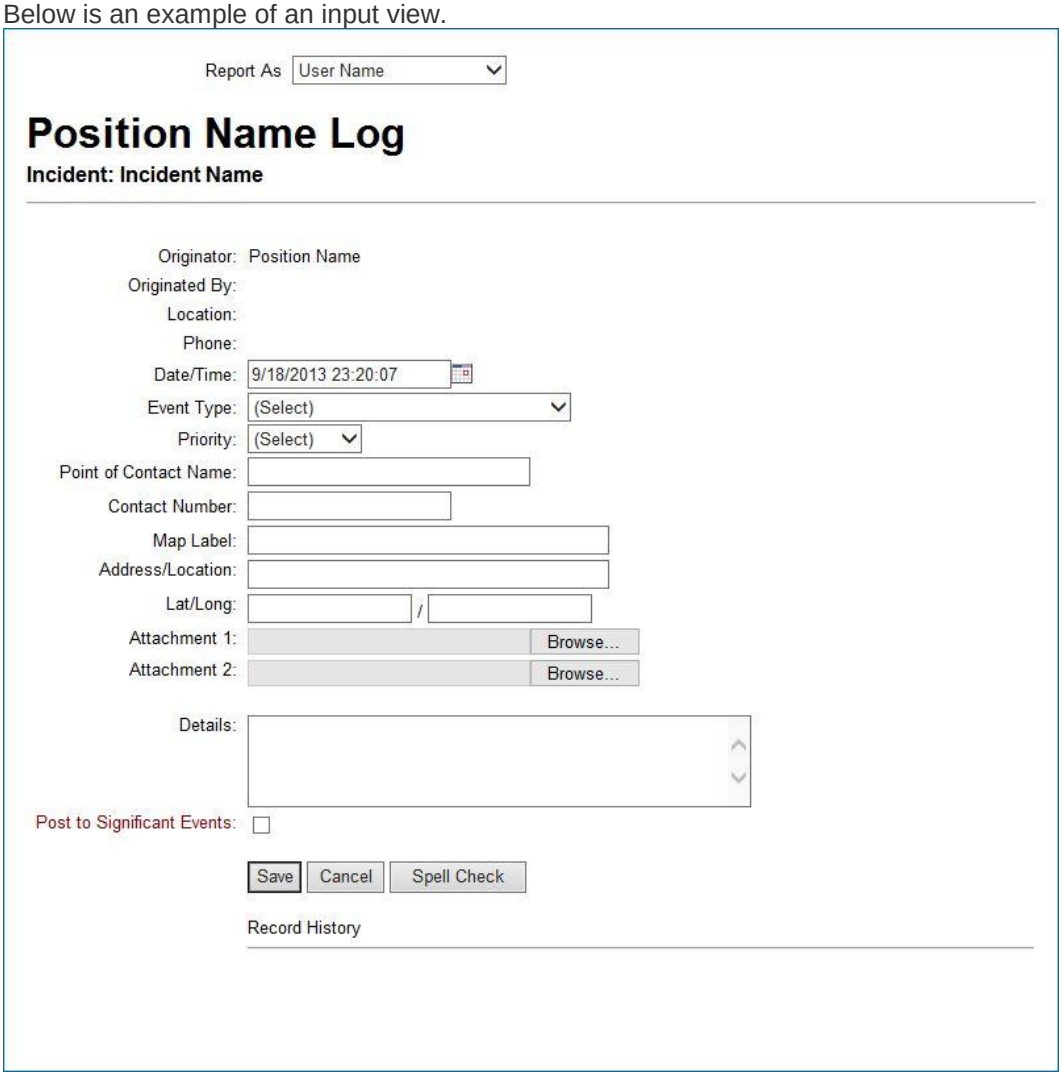
HTML Conventions

Board Components

Every board has two types of views: input views and display views. Data is entered and updated in the input view and displayed in the display view. The data resides in one or more tables created specifically for that board based on the input fields defined in the input form's HTML.

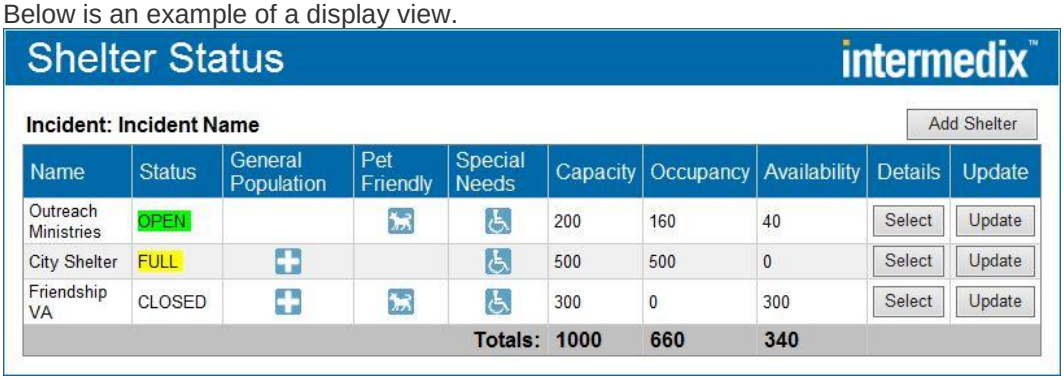
Input View

Below is an example of an input view.



Display View

Below is an example of a display view.



Shelter Status

intermedix

Incident: Incident Name

Add Shelter

Name	Status	General Population	Pet Friendly	Special Needs	Capacity	Occupancy	Availability	Details	Update
Outreach Ministries	OPEN				200	160	40	Select	Update
City Shelter	FULL				500	500	0	Select	Update
Friendship VA	CLOSED				300	0	300	Select	Update
				Totals:	1000	660	340		

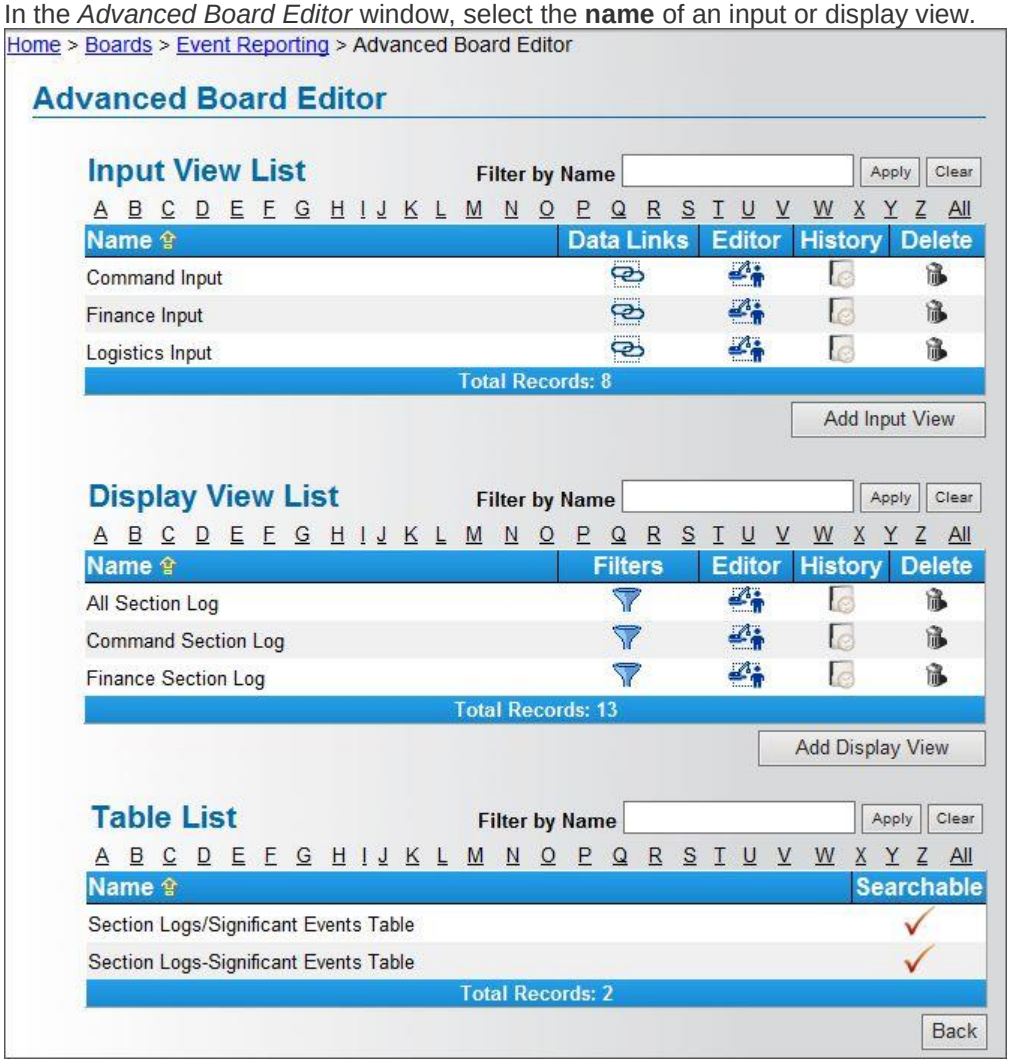
Edit View Window

Board code changes are entered in the HTML section of the Edit View window. If you are using an external HTML editor, this is the area where you will paste in your code.

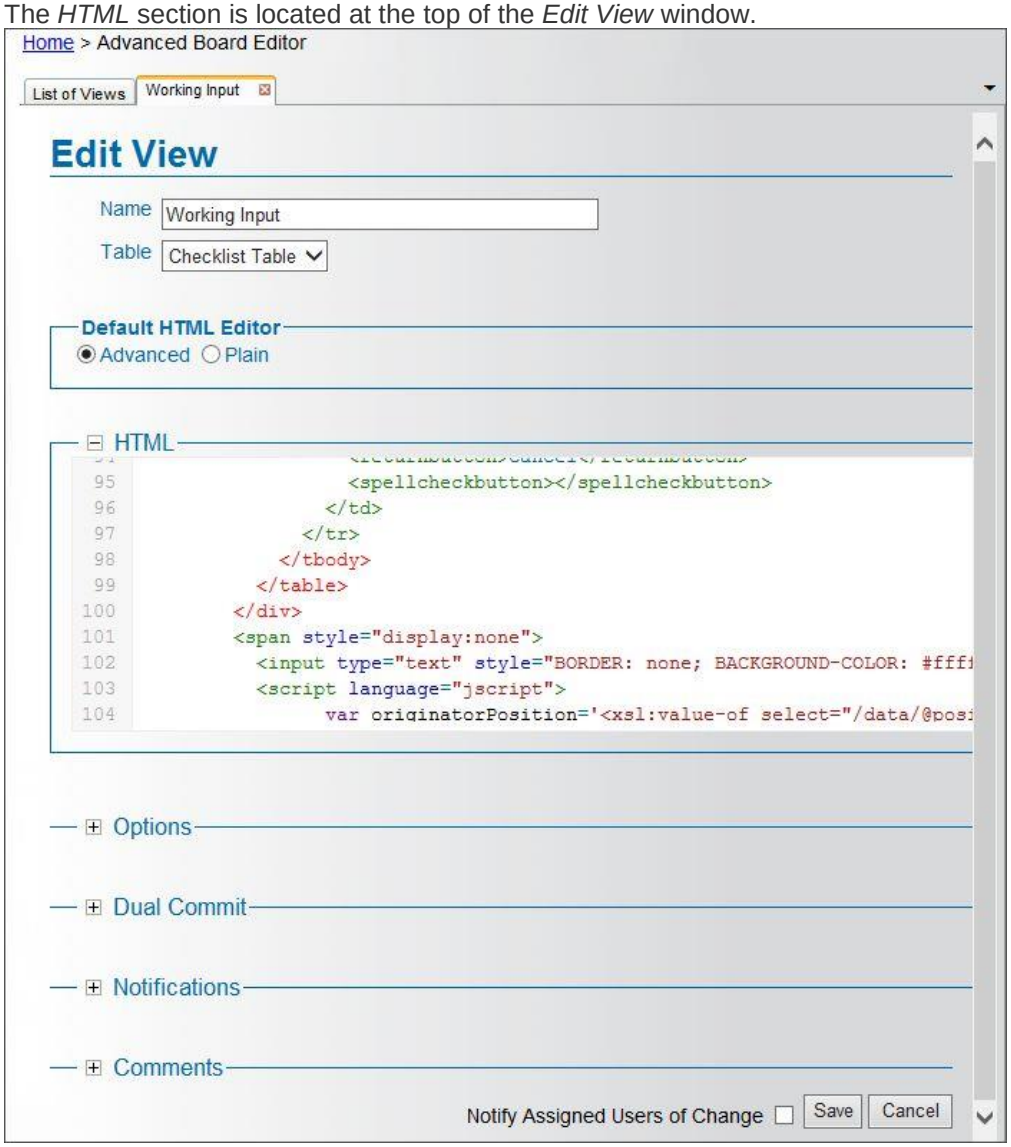
To access a board's Edit View window, follow the steps below.

1. Select the **Boards** link in the *Process* section of the admin window.
2. Select the **name** of the board.
3. Select the **Advanced Board Editor button**.

4. In the *Advanced Board Editor* window, select the **name** of an input or display view.



5. The *HTML* section is located at the top of the *Edit View* window.



Default HTML Editor

By default, WebEOC is set to use the *Advanced HTML* editor, which has features like syntax highlighting and auto-completion. Select the **Plain** radio button to set the HTML editor to use a plain-text editor.

Supported HTML Tags for Input Views

WebEOC allows you to use all HTML tags; however, the following tags should be used for input views only.

- <input>
- <select>

- <textarea>

By default, the <input> and <select> tags are represented in the SQL Server® database with a variable character field (nvarchar) limit of 500 characters. Text fields that hold an unlimited amount of data are <textarea> fields. The underlying database field types can be overridden by the “fieldtype” attribute. Additionally, field length for nvarchar fields can be overridden using the “fieldlength” attribute. If the “fieldtype” is set to datetime, then the “format” attribute can be used to format the output of the field. See the SQL Server® documentation on the convert function for more information on available datetime formats.

<input>

The <input> tag is used to create data entry elements. An input field varies depending on the type of attribute you assign to it. An input field can be a text field, a checkbox, a password field, a radio button, a button, and more.

WebEOC allows you to use the following values for the type attribute of the input tag.

- text: This value creates a text field (<input type="text" />).
- checkbox: This value creates a checkbox (<input type="checkbox" />).
- radio: This value creates a radio button (<input type="radio" />).
- hidden: This value hides the input field (<input type="hidden" />).
- password: This value creates a password field (<input type="password" />).

Input fields that have text can have one of three predefined values. These predefined values cause the field type to be datetime.

- _currentdate: This value causes the field to be the current date. The format will be 101 (mm/dd/yyyy).
- _currenttime: This value causes the field be the current time.The format will be 108 (hh:mm:ss).
- _currentdatetime: This value causes the field to be both the date and time. The format will be 100 (mm/dd/yyyy hh:mm:ss).
- _number: This value causes the field to be 0 and the field type to be int (integer). The format will be 0 (int).

For example, the code <input type="text" value="_currentdate" /> causes the field type to be the current date.

The code below specifies you want a text field, and you want it to be named “location.”

<input type="text" name="location" />

<select>

The <select> tag is used to create a list of selections, typically a drop-down list. The <select> tag can be populated with lists contained in WebEOC. The lists are entered using the List manager. To populate a <select> tag with a WebEOC list, use a “list” attribute on the <select> tag to set the name of the list. See the example below.

<select name="FieldName" list="ListName">
</select >

When using hard-coded <select> lists with <option> tags, each <option> tag must contain a “value” attribute where the value of the “value” attribute matches the text between the opening and closing <option> tag. Otherwise, the selected list value will be saved to the WebEOC database as an empty string.

<select name="FieldName">
<option value="Yes">Yes</option>
<option value="No">No</option>
</select>

WebEOC allows for a select element to display the entire list of EOC users or positions. The syntax for this <select> tag is as follows.

For users:
<select name="FieldName" list="Users">
</select>

For positions:
<select name="FieldName" list="Positions">
</select>

processpermission and processgroup Attributes

WebEOC extends the select element with a few WebEOC-specific attributes to display a partial or complete list of EOC users or positions.

The list attribute allows displaying the entire list of EOC users or positions:

For users:
<select name="FieldName" list="Users">
</select>

For positions:
<select name="FieldName" list="Positions">
</select>

A list of all groups and positions for a process permission can be displayed by using two attributes. The processpermission attribute specifies the name of the process permission, and the processgroup attribute specifies the group or position.

<select name="FieldName" processpermission="Requesting" processgroup="groups">
</select>

To see all positions for the "Requesting" process permission:

<select name="FieldName" processpermission="Requesting" processgroup="positions">
</select>

<textarea>

The <textarea> tag defines a multi-line text input control. A <textarea> tag can hold an unlimited number of characters, and the text renders in a fixed-width font. The size of a <textarea> tag can be specified by the “cols” (columns) and “rows” attributes.

WebEOC-specific Tags

WebEOC uses the following special tags. These are listed in alphabetical order.

<agencyinfo>

The <agencyinfo> tag displays the information you created in the Agency Template manager. The agency name, primary logo, secondary logo, and activation message can be displayed in a board by assigning those values to the type attribute. These items are rendered as text.

name

Assigning a value of name to the type attribute places your agency’s name in a board in WebEOC.

<agencyinfo type="name"/>

primarylogo

Assigning a value of primarylogo to the type attribute places your agency’s primary logo in a board in WebEOC.

<agencyinfo type="primarylogo"/>

secondary logo

Assigning a value of secondarylogo to the type attribute places your agency's secondary logo in a board in WebEOC.

<agencyinfo type="name"/>

secondarylogo

activationmsg

Assigning a value of activationmsg to the type attribute displays the System-wide Activation Message (created in the Agency Template manager) in a board in WebEOC.

<agencyinfo type="activationmessage"/>

<attachment>

The <attachment> tag displays a download link for downloading file attachments

<attachment name="fileid">html</attachment>

The "name" attribute holds the fileid. The "table" attribute is used for <attachment> tags defined within a <relatedlists> tag.

<attribute>

The <attribute> tag is used to add field values within attributes while maintaining valid XML. Below is an example of invalid XML.

<a href="<eocfield name="url" />">A link

Note: The <href> attribute means hyperlink.

Instead use the <attribute> tag to add the "href" attribute to the anchor tag.

<a>

<attribute name="href">

<expression name="href">url</expression>

</attribute>

A link

The <attribute> tag can also contain other tags, such as <if> tags, for conditional processing.

<boardname>

The <boardname> tag displays the name of the board to the users. If you change the board name in the admin interface, it will be updated anywhere the <boardname /> tag is used. It is usually located within the display view of a board. You can use it within a <viewlink> tag to dynamically name the text within the <viewlink>.

<boardname />

<cancelbutton>

The <cancelbutton> tag places a cancel button in a view's user interface.

<cancelbutton>

<calendar>

The <calendar> is used to place an interactive calendar on a status board. The calendar has a day view, a week view, a month view, and a year view that users can navigate through. Users can also create appointments that are tied to a WebEOC record in a WebEOC table identified in the <calendar> tag.

- appointmentnamefield - the field to be used as the appointment name on the calendar
- appointmenttypefield - the field to be used for the appointment type on the calendar
- starttimefield - the field to be used for the appointment start time on the calendar
- endtimefield - the field to be used for the appointment end time on the calendar
- commentsfield - the field to be used for the appointment comments on the calendar
- displayview - the display view to be shown when the user clicks on an appointment

<tr>

<td>Name:<input type="text" name="name" /></td>

</tr>

<tr>

<td>Type of Appointment<input type="text" name="type"/></td>

</tr>

<tr>

<td>Start Time<input type="text" name="starttime"/><span style="cursor:pointer;"
onclick="OpenBoardDateTimePicker(event,'starttime','true');">

<img src="../lib/cal.gif" width="16" height="16" border="0" alt="Pick a date"></img>

</td>

</tr>

<tr>

<td>End Time<input type="text" name="endtime"/><span style="cursor:pointer;"
onclick="OpenBoardDateTimePicker(event,'endtime','true');">

<img src="../lib/cal.gif" width="16" height="16" border="0" alt="Pick a date"></img>

</td>

</tr>

<tr>

<td>Comments: <textarea name="comments" id="" cols="30" rows="10"></textarea></td>

</tr>

To create a calendar on the display view:

<calendar width="500px" height="500px" appointmentnamefield="name" appointmenttypefield="type"
commentsfield="comments" endtimefield="endtime" starttimefield="starttime" displayview="Test"/>

<choose>

This is the “choose-when-otherwise” tag that works much like the <if> tag, but provides the “otherwise” tag that renders whenever none of the “when” tags evaluate to true. The “test” attribute is the Boolean test to evaluate.

<choose>

<when test="@status='Open'">Open</when>

<when test="@status='Closed'">Closed</when>

<otherwise>Full</otherwise>

</choose>

<clearsearchbutton>

The <clearsearchbutton> tag places a clear search button in the Advanced Board Editor user interface.

<clearsearchbutton>

<clicktoedit>

Any text inside the <clicktoedit> tag will be available to select for opening up the input view. This is useful for expressions.

<clicktoedit>Some stuff here</clicktoedit>

<dataexpression>

The <dataexpression> tag specifies fields or values that populate a chart.

- color - the color of the value in the chart
- label - the text of the label or legend for this value

<dataid>

The <dataid> tag is used to display the dataid for the record and create a link users can select to update the record. It has no attributes.

<dataid />

<datalink>

The <datalink> tag suppresses the datalinks section and displays a checkbox for the specified datalink.

<datalink name=”Significant Events” />

The <datalink> tag uses the “name” attribute.

If using a <datalink> tag you must specify one for each datalink defined because the traditional datalinks section will be completely suppressed.

<embedrss>

The <embedrss> tag allows an RSS feed to be embedded in a view. It is rendered as a tag.

- class - CSS class identifiers
- displaytime - the number of seconds to display pagesize of items; 0 = no auto-paging
- feedexpiration - how often the server goes to the feed for updates; minimum 5, measured in minutes
- height - container height
- omitheader - displays the title of the RSS feed or not
- pagesize - the number of items to display at once; 0 = all items
- quantity - the number of items to retrieve from the server; 0 = all items
- scrolling - scrollbar or none
- src - the URL of the RSS feed
- style - inline style information
- updateinterval - how often the client goes to the server for updates; minimum 5, measured in minutes
- width - container width

<embedrss src="http://rss.cnn.com/rss/cnn_topstories.rss"

width="100%" height="50" scrolling="true" />

<embedview>

The <embedview> tag is used to embed one view inside another. It is rendered as an iframe.

The following are valid tag attributes:

- view – This is the name of view to be embedded.(This is required.)
- board – This is the name of the board that contains the view to be embedded. If not specified, then the current board is assumed.
- style – This is a pass-through attribute that allows the resulting HTML container's style to be specified.
- class – This is a pass-through attribute that allows the resulting HTML container's class to be specified.
- id – This board-builder specified id is used with the target attribute in the <viewlink> tag.
- enablefooter – This is a true|false attribute that specifies whether or not to display the board footer as part of the embedded view to allow paging. The default is false.
- width – This attribute determines the width of the embedded view, in pixels or percentage.
- height – This attribute determines the height of the embedded view, in pixels or percentage.
- scrolling – This is an auto|true|false attribute that determines whether or not to allow scrolling if the content is bigger than the embedded view. The default is set to auto.

<embedview name="details" board="Objective Test" width="100px" height="100px">
</embedview>

<enablerecordlocking>

The <enablerecordlocking> tag can be placed anywhere in the HTML for an input view to enable record locking for the designated input. With record locking enabled, if two or more users open a record for editing and one user saves the record while the other user has the record open, this user will receive a warning message if or when the user attempts to save the record. The warning gives the user the opportunity to cancel. This forces the user to update the newer record.

<enablerecordlocking />

Note: This tag will not work with subscription boards.

<eocfield>

This tag is used inside the <eocrepeatallrecords> tag to display information from the database. This tag is used only on a display view. The <eocfield> tag uses the “name” attribute to specify the field from which the <eocfield> tag is to pull its information. See the example below.

The following keywords can be used for specific values of the name attribute.

<eocfield name-”FieldName” />

- dataid – functionally equivalent to the <dataid> tag
- positionname – the name of the position filled by the user who posted the record
- rolename – the name of the role filled by the user who posted the record
- username – the name of the user who posted the record

The name in the <eocfield> tag must match the name in the <input> tag exactly. You can only use any given <eocfield> tag once in the display. The following eocfields are available on every board.

- dataid
- entrydate
- username
- rolename
- incident

The <eocfield> tag can also use the following attributes.

- filetype
- disableclick
- type

<eocrepeatallrecords>

The <eocrepeatallrecords> tag should only be used for display views, and instructs WebEOC to repeat an area of the board’s display for each record contained in the board. The following is an example.

<table>

```
<tr>

<td>Data ID</td>

<td>Location</td>

<td>Description</td>

</tr>

<eocrepeatallrecords>

<tr>

<td><dataid /></td>

<td><eocfield name="location" /></td>

<td><eocfield name="description" /></td>

</tr>

</eocrepeatallrecords>

</table>
```

The <eocrepeatallrecords> tag has two attributes: “rowcount” and “sort.” The “rowcount” attribute changes the default number of returned entries shown per page. For example, the code <eocrepeatallrecords rowcount="20"> will return 20 entries per page. Giving the “rowcount” attribute a value of zero will display all returned entries on the first page.

Note: If a display view where rowcount is set to zero is returning a large set of data entries (for example, 1000+), WebEOC performance could be adversely affected. Avoid setting the rowcount to zero where large data input is expected.

The “sort” attribute changes the default sorting of returned entries (for example, <eocrepeatallrecords sort="lastname, firstname">). Values of the “sort” attribute consist of status board fields defined in the input views of the board. Multi-level sorts are done by including the desired sort fields separated by commas. In the above example, the records are sorted by a field called “lastname,” then by a field called “firstname” (for example, the phone book).

<expression>

The <expression> tag allows you to do calculations on the data in a board. The expression is translated into a SQL Server® expression. The <expression> tag can use the following attributes.

- Name
- Omitalias
- useboardlevelfilters
- usegrouplevelfilters
- useuserlevelfilters

A “name” attribute is required and the contents of the tag must be the expression to be evaluated by the SQL Server®. If more than one <expression> tag is used in the same display view, each must have a unique name.

<expression name="total">sum(quantity)</expression>

If you use this tag outside the <eocrepeatallrecords> tag, it performs the calculation on all data within the board. This is useful for summing rows and other aggregate functions. If you use this tag inside the <eocrepeatallrecords> tag, it performs the calculation on only one record at time.

<externalexpression>

The <externalexpression> tag is used to pull data from a table within the same board that is unrelated to the current table. The “name” attribute displays the alias name of the external expression. The “table” attribute displays the name of the table you want to pull data from.

<externalexpression name="extExpr" table="Other Table"/>count(*)</

externalexpression>

<field>

The <field> tag denotes fields to search against. The parent must be a <search> tag.

- name - the name of the field to search

<search>

<field name="RequestItemName"></field>

<field name="RequestorPosition"></field>

<field name="City_User_Requestor_Pos"></field>

<field name="posNext"></field>

<field name="posInCity"></field>

<field name="RequestQty"></field>

</search>

<filter>

The <filter> tag displays the text “Filter Applied” if the board has a filter set.

<filter />

<filterbutton>

The <filterbutton> tag places a filter button in a view’s user interface.

This filter button can be used to toggle filter activation from display view.

You can also group multiple filter buttons together for mutual exclusion (radio button behavior).

- name - the name of the view filter
- group - an id to group filterbuttons as mutually exclusive

<filterbutton name="My Requests" group="priority">

<on>

<attribute name="disabled">true</attribute>

<attribute name="class">btn btn-small</attribute>

My Requests

</on>

<off>

<attribute name="class">btn btn-small</attribute>

My Requests

</off>

</filterbutton>

<filterdropdown>

The <filterdropdown> tag provides the same functionality as multiple <filterbutton> tags using the “group” attribute but in a more convenient drop-down format. The “defaulttext” attribute is the first option in the drop-down that represents no filters applied. Underneath the <filterdropdown> tag, you must have <filter> tags with the name attribute set.

<filterdropdown defaulttext="All">

<filter name="Open Filter">Open</filter>

<filter name="Closed Filter">Closed</filter>

</filterdropdown>

<foreignkey>

The <foreignkey> tag is used to create a “one-to-many” relationship between tables. A <foreignkey> tag must appear in any input form for a table that forms a one-to-many relationship to another table. For example, the Resources board has two tables: Resources and Deployments. Resources is the “parent” table in the parent-child relationship. When setting up a parent-child relationship within WebEOC, the input view for the child table will always have a <foreignkey> tag pointing back to the parent table. This causes WebEOC to create a field in the child table that stores the id of the parent record that each child record is related to. In this example, the Deployments input view has a <foreignkey> tag that links many deployments to a single resource. The <foreignkey> tag must have a “table” attribute that specifies the name of the table to be related.

Below is an example of a Deployments input view.

<foreignkey table="Resources" />

In this case the tag produces no visible output and the view must be accessed using a <viewlink> tag from a resources view. Another option is to have an attribute called “type” that can be set to select. When this is set, a drop-down list appears allowing the user to pick the record. The option text is based on the

content of the <foreignkey> tag. If an <eocfield> tag is used, set the “type” attribute to fk and the “table” attribute to the name of the related table. The <foreignkey> tag can use the following attributes.

- filter
- sort

<foreignkeyreference>

The <foreignkeyreference> tag replaces a child's eocfield reference to a parent’s data ID with a reference to the parent's table name, wrapped within an expression. Since expressions in related lists are not supported in WebEOC, this cannot be used in a parent to pull the child’s data ID. The <foreignkeyreference> tag can use the following attributes.

- filter
- sort
- table - the name of the parent table

<grouplist>

The <grouplist> tag adds the list of groups the user and/or position belongs to the XML for the board to be used in conditional processing.

<grouplist />

<if>

The <if> tag allows for conditional processing within the HTML. The <if> tag maps directly to an XSL:<if> tag, and similar syntax should be used. Set the “test” attribute to conduct the test you wish to perform. The contents should be the output that results if the test is true. Use the @ symbol in front of field names. Any WebEOC field referenced in the if statement must have a corresponding <eocfield> tag somewhere in the view.

<td>

<attribute name="bgcolor">

<if test="@overdue='true'">red</if>

<if test="@overdue='false'">green</if>

<attribute>

</td>

<incidentname>

The <incidentname> tag displays the name of the incident the user is currently logged in to or, if logged into a master view, a drop-down list of incidents that allow the user to filter the board by incident.

<incidentname />

<incidentselector>

The <incidentselector> tag allows you to select a different incident for a board entry. It does not show on incident independent or form views. It is disabled for existing board entries when part of a regional incident in a subscription board. This tag suppresses the master view drop-down list in boards.

<select id="incidentselector" name="incidentselector">

<off>

The <off> tag contains text to display when a viewfilter is off. The parent must be a <filterbutton> tag.

<filterbutton name="My Requests" group="priority">

<on>

<attribute name="disabled">true</attribute>

<attribute name="class">btn btn-small</attribute>

My Requests

</on>

<off>

<attribute name="class">btn btn-small</attribute>

My Requests

</off>

</filterbutton>

<on>

The <on> tag contains text to display when a viewfilter is on. The parent must be a <filterbutton> tag.

<filterbutton name="My Requests" group="priority">

<on>

<attribute name="disabled">true</attribute>

<attribute name="class">btn btn-small</attribute>

My Requests

</on>

<off>

<attribute name="class">btn btn-small</attribute>

My Requests

</off>

</filterbutton>

<pdflink>

There are two ways to use the <pdflink> tag.

You can use it to add a button to the board.

<pdflink type="button">Print PDF</pdflink>

You can also use it to add the feature as a link to a board.

<pdflink>Open as PDF</pdflink>

The <foreignkeyreference> tag can use the following attributes.

- enablejs
- board
- view

<printbutton>

The <printbutton> tag creates a print button where ever the tag is located. The button itself is not printed.

<printbutton/>

<relatedlist>

The <relatedlist> tag allows a view to display the “many” related records from another table to a single record. It must be used in either an input view or a single-record display view that is linked from another display view using a <viewlink> tag. Functionally similar to the <eocrepeatallrecords> tag, be sure to set the “type” attribute to rl and the “table” attribute to the name of the related table. You must use the “table” and “type” (rl) attributes on any eocfields within the <relatedlist> tag. This tag also uses the “sort” attribute.

<relatedlist table="Deployments">

<eocfield name="FieldName" table="Deployments" type="rl" />

</releatedlist>

<relatedexpression>

Similar to the <expression> tag, the <relatedexpression> tag allows for calculations across related tables. The “table” and “name” attributes must be set, and must be the “many” table. It may also be used within an <expression> tag. The “name” attribute displays the desired name of the <relatedexpression>. The “table” attribute displays the name of the table that holds the foreignkey field to the current table.

Note: You can also use a <relatedexpression> tag inside an <expression> tag.

<relatedexpression name="totalcost" table="deployments">

Sum(cost*quantity)

</relatedexpression>

<returnbutton>

The <returnbutton> tag returns the user to the previous view.

<returnbutton>Return to List</returnbutton>

<search>

The <search> tag enables administrators to add searching capabilities to the display view. The “field” attribute displays the name of the field to be searched. The “exact” attribute says that the search must be an exact match. The <search> tag can use the following attributes.

- cleartext
- range
- rangetext
- searchtext
- showcalendar
- showclear

<search field="description" exact="false" />

<space>

The <space> tag inserts an   where the tag is located.

Note: means non-breaking space.

<space />

<userinfo>

<userinfo> - displays information about a user, renders as text in a pre formatted div.

User info will allow you to select a type of information to pull from user information.The <userinfo> tag can use the following attributes.

- realname
- location
- phonenumber
- officephone
- mobilephone

- department
- organization
- supervisor
- primaryemail
- type

<userinfo type=”realname”/>

<validate>

The <validate> tag can be applied to any input[type=text] or textarea. When applied, WebEOC verifies that the user-supplied value matches the specified format.

The following formats are available.

- board
- view
- target
- datetime – A valid date and time
- date – A valid date
- time – A valid time
- integer – A valid whole number
- decimal – A valid number, with or without a decimal point

<input type="text" name="due_date" validate="datetime" />

<value-of>

The <value-of> tag is used to display a field a second time after having already displayed it using an <eocfield> tag.

<value-of select="@fieldname"/>

<viewlink>

The <viewlink> tags provide a mechanism to jump to another view within a board. For example, a summary list view may have a <viewlink> tag that allows users to select a single record and view a detail view that contains more information for that record. The “name” attribute should be the name of the view you want to link to, and if the view is for another table, you must include the “table” attribute. If the “type” attribute is set to button, the link appears in the form of a button. Otherwise, a standard HTML link is displayed. The contents of the tag are displayed on the button or the link.

<viewlink name="Detail" type="button">View Detail Page</viewlink>

Multi-tiered Lists

Multi-tiered lists are created and defined in the Lists manager. (See the Processes topic for details on creating and defining lists.) After you create the lists in the Lists manager, the lists can be added to a board using the Advanced Board Editor. The example code below will assist you with implementing multi-tiered lists in your boards. In the example below, “from_list” is the name of your list, and “from_sublist” is the name of your sublist. The “from_sub_sublist” is the name of your sub-sub-list. Replace these items with the names of the lists you have created.

<select name="from_list" list="Multi-Tiered List" />/

<select name="from_sublist" list="Multi-Tiered List" parent="from_list" />/

<select name="from_sub_sublist" list="Multi-Tiered List" parent="from_sublist" />/

Chart and Data Tags

Increasingly, WebEOC administrators are seeking to convey information in graphical formats that maximize information transfer while minimizing screen real estate used. Dashboard views, executive overviews, and display-view based summary reports all need the ability to display numerical data in chart and graph form. WebEOC 7.4 supports this capability through the use of the chart tag and data subtag.

<chart> Tag

The <chart> tag will be supported in any display view, and will display in PDFs generated using the <pdflink> tag. The <chart> tag will not be supported in remote boards or on the PDA interface. It will support the following attributes.

- type: The type attribute controls the type of chart displayed. The supported types are pie, line, and bar.
- legend: A boolean value that specifies whether a legend will be displayed. The default is false.
- legendplacement: A string value that specifies where the legend will be displayed. The supported values are top, middle, and bottom. The legend will automatically be placed to the right of the chart.
- labels: Whether or not to label the values when not using a legend. The default is true.
- backgroundcolor: This attribute specifies the background color of the chart. Any HTML color can be used, and the default is white.
- textcolor: The color of text in the legend or labels.
- font: The font of the text in the legend or labels.
- width: The width of the chart, in pixels.
- height: The height of the chart, in pixels.
- groupby: Causes chart data to be collated by the indicated value and is only specified when the <chart> tag is outside of the <eocrepeatallrecords>. Optional on board and pie charts, but is required with line charts. In line charts, the groupby attribute provides the x-axis of the chart.
- filter: Conditional that can be used to filter data. Is only applied when the <chart> tag is used outside of the <eocrepeatallrecords>.

<dataexpression> SubTag

The <dataexpression> subtag specifies the fields or values that populate the chart and work much like expression tags. When the <chart> tag is used outside of the <eocrepeatallrecords>, the data tag must be an aggregate function. The <dataexpression> subtag supports the following attributes.

- label: The text of the label or legend for this value.
- color: The color of the value in the chart.

Using Chart Tags

Below are three basic examples of charts that can be created using <chart> and <dataexpression> tags.

Pie Chart

This example is a theoretical “overall shelter availability” pie chart that would be specified outside of the <eocrepeatallrecords> tag.

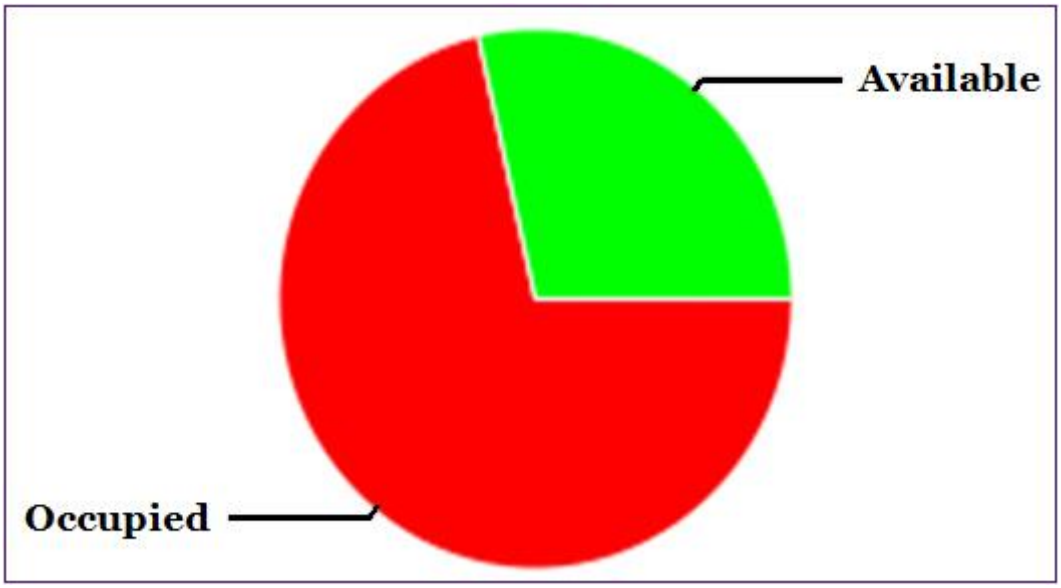
<chart type="pie" filter="status!='Closed'">

<data label="Occupied" color="red">sum(occupancy)</dataexpression>

<data label="Available" color="green">sum(capacity-occupancy)

</dataexpression>

</chart>



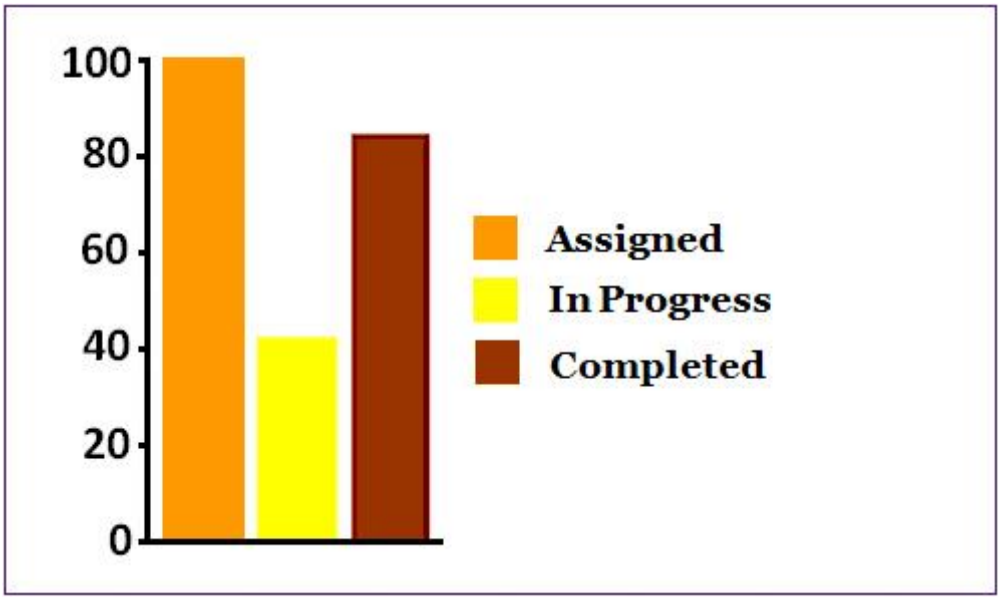
Bar Chart

The following bar chart uses the groupby attribute to show the number of tasks in a Mission/Task board for each status.

<chart type="bar" groupby="status" legend="true"labels="false">

<dataexpression>count(*)</dataexpression>

</chart>



Line Chart

The next example uses a line chart to show the number of position log entries over time.

<chart type="line"groupby="convert(varchar,orginating_datetime,101)">

<dataexpression>count(*)</dataexpression>

</chart>